



TRICARE Management Activity

**Protected Health Information Management Tool
(PHIMT)**

**Training Reference: Privacy Specialist Manual
Version 1.0**

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This page lists all of the changes that have been made to the PHIMT Privacy Specialist Manual throughout its development.

Version	Release Date	Summary of Changes

Table of Contents

1.0	INTRODUCTION TO PHIMT	1
1.1	PHIMT REQUIREMENTS	1
1.1.1	SYSTEM REQUIREMENTS	1
1.1.2	BROWSER REQUIREMENTS	1
1.1.3	PLUG-INS	2
2.0	GETTING STARTED	2
2.1	USER DEFINITIONS AND ROLES	2
2.1.1	PHIMT ROLES AND PERMISSIONS.....	3
2.1.2	PRIVACY SPECIALIST ROLE	3
2.1.3	INTERACTION WITH THE USER ADMIN.....	3
3.0	ACCESSING AND USING PHIMT	4
4.0	PRIVACY SPECIALIST TABS	6
4.1	USER TAB.....	6
4.2	PATIENT TAB	7
4.3	ADMIN TAB	8
4.4	REQUESTS TAB.....	8
4.5	REQUESTER TAB.....	9
5.0	UNDERSTANDING PHIMT SCREENS	10
5.1	SCREEN FEATURES	10
5.1.1	DATE	10
5.1.2	NAVIGATIONAL OPTIONS.....	10
5.1.3	STATUS BOX	10
5.1.4	ACTIVITY HYPERLINKS	11
5.1.5	PHIMT SCREEN TABS	11
5.1.6	SCREEN TITLE	11
5.1.7	DISPLAY SCREEN/APPLICATION WINDOW	11
5.2	PHIMT ERROR MESSAGES.....	12
6.0	USER TAB ACTIVITIES.....	12
6.1	MY PROFILE.....	12
6.2	MY REQUESTS	14
6.3	MY WORKLIST	14
6.4	SWITCH ORGANIZATIONS	15
7.0	PATIENT TAB ACTIVITIES	16
7.1	PATIENT SEARCH.....	16
7.2	CREATE PATIENTS.....	17
8.0	PRIVACY SPECIALIST ACTIVITIES	20
8.1	RECORD DISCLOSURES.....	20
8.2	APPROVE DISCLOSURES.....	25
8.3	AMEND A DISCLOSURE	27
8.4	RECORD A REQUEST FOR AN ACCOUNTING OF DISCLOSURES.....	29
8.5	APPROVE ACCOUNTING OF DISCLOSURES.....	32
8.6	GENERATE AN ACCOUNTING OF DISCLOSURES REPORT	35
8.7	CREATE A SUSPENSION.....	36
8.8	RECORD COMPLAINTS.....	39
8.9	RECORD DISCLOSURE RESTRICTIONS.....	43
8.10	GENERATE AUTHORIZATIONS	46
8.11	SIGN AN AUTHORIZATION	50
8.12	REVOKE AN AUTHORIZATION.....	52
8.13	ADMINISTRATIVE SUMMARY REPORTS.....	54
9.0	PRIVACY SPECIALIST GLOSSARY	56
10.0	PRIVACY SPECIALIST ROLE PERMISSIONS	61

1.0 INTRODUCTION TO PHIMT

The Privacy Rule of the Health Insurance Portability and Accountability Act (HIPAA) of 1996 requires a covered entity, (i.e., the Military Health System (MHS)) to maintain a history of when and to whom disclosures of Protected Health Information (PHI) are made for purposes other than treatment, payment and healthcare operations (TPO). The MHS must be able to provide an accounting of those disclosures to an individual upon request. Authorizations and Restrictions from an individual to a covered entity are included in the information that is required for tracking purposes.

To comply with the requirements for disclosures, the TRICARE Management Activity (TMA) is providing an electronic disclosure-tracking tool. The Protected Health Information Management Tool (PHIMT) stores information about all disclosures, authorizations, and restrictions that are made for a particular patient. PHIMT has a functionality built into it that can provide an accounting of disclosures, if necessary.

The MTF should have knowledge of DoD 6025.18-R, Health Information Privacy Regulation. A MTF must provide an accounting of disclosures within 60 days of the request. If the covered entity cannot honor an accounting of disclosures within the 60-day period, it must provide information to the requestor as to the reason for the delay and expected completion date. The covered entity may extend the time to provide the accounting by no more than 30 days. Only one extension is permitted per request.

1.1 PHIMT REQUIREMENTS

Before using PHIMT it is necessary to understand and ensure the operating requirements are met. PHIMT has specific requirements for the operating system, browser, and plug-ins.

1.1.1 System Requirements

Using PHIMT requires a Microsoft Windows application: Windows XP (home, professional); Windows 2000 (standard, professional, advanced); or Windows 98.

***NOTE:** Windows NT does work with PHIMT in most cases, but some limitations may exist. Therefore, Windows NT is not supported for use with PHIMT.*

1.1.2 Browser Requirements

PHIMT requires the use of Microsoft Internet Explorer, version 6.0 or above.

***NOTE:** Cookies and JavaScript should be enabled (these items are enabled in a default browser installation)*

1.1.3 Plug-Ins

PHIMT requires the use of Adobe Acrobat, version 6.0 or above. The application will also work with version 5.0 but the latest version is recommended.

***NOTE:** To display the generated letters and reports in the browser, the Adobe Acrobat Plug-in is required. This is normally installed with Adobe Acrobat Reader. Download Adobe Acrobat for free at <http://www.adobe.com>.*

2.0 GETTING STARTED

In PHIMT, the Privacy Specialist is usually the MTF's Privacy Officer. The Privacy Specialist approves and denies disclosure requests, and restricts and suspends disclosures. Much of this tasking is forwarded from the Regular User. In addition, the Privacy Specialist works closely with the User Admin in creating user roles within an organization and user-to-user relationships.

2.1 USER DEFINITIONS AND ROLES

Each User is assigned to one or more organizations (an organization is a logical or physical entity such as an MTF, a Service or TMA).

- Within an organization, each user can have one or more roles.
- A user can have the same roles in multiple organizations, or different roles in multiple organizations.
- Roles are inherited down the permission levels.

A **Role** is a named collection of permissions. Roles allow Users with the same permissions to be grouped under a unique name. PHIMT roles include: Regular User, User Admin, Privacy Specialist, and Tool Admin.

- A **Regular User** is a general role with basic functionality. This role can create disclosures and authorization requests that can be routed on to a Privacy Specialist.
- A **User Admin** is a local administrator for an MTF or a designated Service. This role allows one to add/modify users from within their Service and assigns roles. The email account administrators will handle this role for each MTF or Service.
- A **Privacy Specialist** is the Privacy Officer or MTF designee. This role allows the User to maintain disclosure reporting by approving and or denying various disclosure requests.
- A **Tool Administrator** has global access to the application and will be maintained by the HIPAA Support Center. This role allows the User to configure roles within MTFs, and create permissions within the application.

***NOTE:** Your particular user role will determine the PHIMT activities you are authorized to perform. For example, as a Privacy Specialist, you can perform only those activities listed on*

the User, Admin, Patient, Requests, and Requester tabs. Different user roles are authorized to access different tabs.

2.1.1 PHIMT Roles and Permissions

PHIMT roles and permissions are based on status-level relationships within service groups. These service groups consist of the Army, Navy, Air Force, and Coast Guard. Anyone in a given service group can be granted access to information required for them to perform their duties. Specific roles have corresponding permissions that determine who will have access to what. Individuals within PHIMT roles have access to information required for job performance as well as access to information accessible to those roles with fewer permissions. No individual will be granted access to information needed to perform duties that require a higher set of permissions. Those in roles with the highest levels of permissions will have access to all information within their service group. No individual within any service group will be granted access to information in a service group other than their own.

For example, the TMA (TRICARE Management Activity) and Support, Group A the top tier, occupies those roles with the highest levels of permissions. These individuals are granted access to all information within their Service Group. Those individuals in the Service Groups who occupy roles requiring a lower level of permissions, Group B the second tier, do not have access to the information accessible to those in the top tier. However, Group B does have access to the information in tier C, comprised of roles requiring even lower permission levels. The third tier, Group C, is comprised of offices and command centers within the service groups. This tier can only access information necessary for them to complete their responsibilities. They do not have access to information within the higher tiers. There is absolutely no viewing of another's information outside of your own service group.

2.1.2 Privacy Specialist Role

In PHIMT, the Privacy Specialist is usually a Privacy Officer within the facility or a designee at an MTF or Service level. This role allows the user to maintain disclosure reporting, approve/deny disclosure requests, amend requests, restrict and suspend disclosures, and issue complaints.

The Privacy Specialist understands how the MTF manages disclosures. Disclosure requests may be routed from a Regular User to the Privacy Specialist or from one Privacy Specialist to another. This process helps establish working relationships between the different PHIMT users.

2.1.3 Interaction with the User Admin

In order for PHIMT to be most beneficial, users within departments that manage Protected Health Information (PHI), are assigned roles with a varying degree of permissions. Some of the departments that the Privacy Officer may wish to grant access include, (but are not limited to):

- Medical records
- Release of information

- Patient advocate
- Patient's rights
- Privacy office

Some or all individuals within the various departments may be designated as Regular Users or Privacy Specialists.

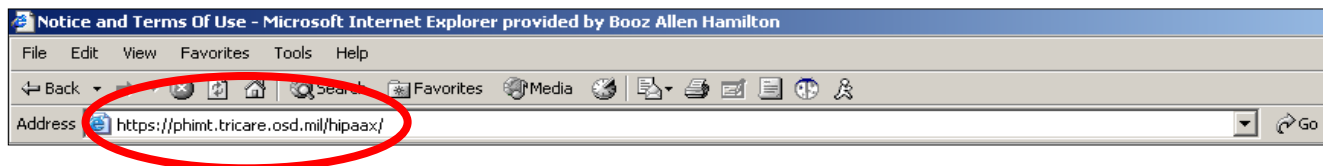
The User Admin creates accounts and User-to-User Relationships as directed by you, in your role as the Privacy Officer. A collaborative effort is required to ensure the release of PHI is managed within PHIMT. Before establishing any accounts, you need to understand the way the MTF manages disclosures, the key individuals involved in the release of information and tracking of disclosures, and the approval process. The User Admin has a complementary knowledge base and understands how to create a workflow by routing the requests of a Regular User to a Privacy Specialist and from a Privacy Specialist to another Privacy Specialist, if necessary. Multiple User-to-User Relationships can be established throughout the facility.

3.0 ACCESSING AND USING PHIMT

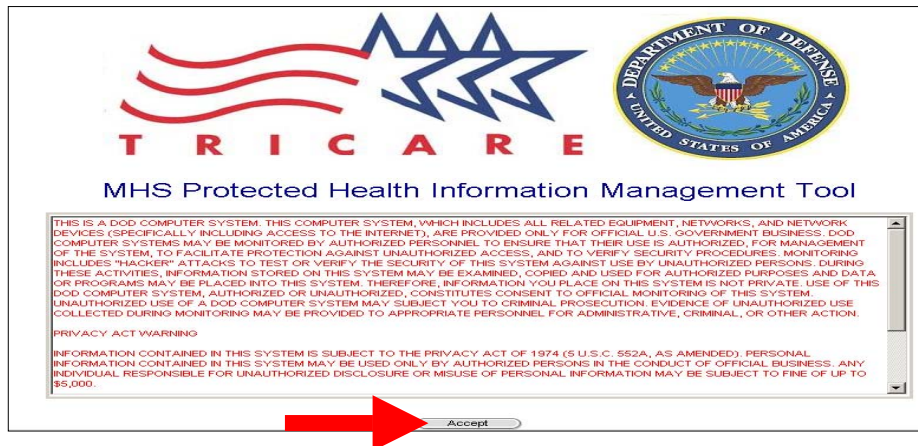
Now that you have an understanding of why PHIMT was developed and are familiar with its capabilities and system requirements, and have basic knowledge about your role as a Privacy Specialist, you are ready to access the application.

To login to the PHIMT application:

1. Enter the URL for PHIMT into the Web browser,
<https://phimt.tricare.osd.mil>.



2. Read the Notice and Terms of Use.
3. Click on the Accept button.



- Log in using the User Name and temporary Password that has been assigned to you by your User Admin.
4. Type in User Name and Password.
 5. Click on the Login button.

You are logging into the production server.
Information in this version will be retained.

User Name:

Password:

Login

Enter your User Name and Password to login.

- The first time you login you will be prompted to change your temporary password. Your new password must be 8 to 15 characters long and contain at least one of the following:
 - Alphabetic uppercase character
 - Alphabetical lower case character
 - Arabic numeral (0,1,2,3,4)
 - Non-alphanumeric special character (ex: !, @, #, etc.)

Change Password

Error(s) have occurred:
■ This is a temporary password, please change it now.

Old Password (Password that you are currently using.)

New Password (New password you want to use.)

Confirm New Password (Confirm your new password.)

4.0 PRIVACY SPECIALIST TABS

In PHIMT, the Privacy Specialist has access to five tabs:

- User
- Patient
- Admin
- Requests
- Requester

4.1 USER TAB

The User tab contains all PHIMT User related information. The User tab is designed to track all tasks that are assigned to you. It allows you to perform desk duties including: updating your profile, viewing the status of your requests, and tracking your tasks.

As a PHIMT Privacy Specialist, you will have the authorization to perform certain activities in the User Tab by clicking on these hyperlinks:

- My Profile - update personal information
- My Requests – view the status of all requests you initiated
- My Worklist – view and process all requests that have a task currently assigned to you
- Switch Organizations – switch your primary facility status to a different organization, if you are assigned to more than one organization.

Tuesday, February 15, 2005 Patient Search Logoff

Patient **User** Admin Requests Requester

Current User:
Wilson, James
US TMA

My Profile
My Requests
My Worklist
Switch organizations

User Worklist

Activity Instance ID	Request Session ID	Activity ID	Source	Patient	Requester	Status	Creation Date
edit 395	318	Request Acceptance (Disclosure Accounting)		Smith, Joe J	Smith, Joe J	Action Pending	02/11/2005
edit 390	313	Request Acceptance (Disclosure Accounting)		Smith, Joe J	Law Offices of Joe Gibbs	Action Pending	02/03/2005

Naval Hospital Worklist

Activity Instance ID	Request Session ID	Activity ID	Source	Patient	Requester	Status	Creation Date
There are no activities for this queue							

[Accept](#)

4.2 PATIENT TAB

The Patient tab provides the Privacy Specialist with patient specific activities. These activities can be performed when accessed by the following hyperlinks:

- Summary – view a synopsis of all disclosure activities for a particular patient
- Requests – perform the first step in initiating a disclosure activity
- Record Disclosure – record the release of protected health information
- Accounting Suspensions – temporarily postpone the release of protected health information
- Disclosure Restrictions – place constraints on the information being released or the recipient of that information
- Authorization – process an approval for a disclosure
- Patient Profile – create or edit patient information
- Patient Search – look for a particular patient in the PHIMT database

Tuesday, February 15, 2005 Patient Search Logoff

Patient **User** Admin Requests Requester

Current Patient:
None

Summary
Requests
Record Disclosure
Accounting Suspensions
Disclosure Restrictions
Authorization
Patient Profile
Patient Search

Patient Search

FMP-SSSN (Family Member Prefix and Sponsor SSN (in xx-xxx-xx-xxxx format))

- - -

- OR -

by Name (Last) (First)

,

- OR -

by System ID (the identifier created by this system for the person)

[Search](#)

4.3 ADMIN TAB

The Admin tab allows the Privacy Specialist to access basic user admin activities that include maintaining organizations in the PHIMT database. This activity can be performed when accessed by the Organization Management hyperlink. The hyperlink allows you to maintain organizations by editing requested and recipient organizations.

NOTE: If there is a request for a new type of administrative function, please contact your User Admin or the HIPAA Support Center.

The screenshot shows the PHIMT Admin Tab interface. At the top, there is a navigation bar with tabs for Patient, User, Admin, Requests, and Requester. The Admin tab is selected and circled in red. Below the navigation bar, the main content area is titled "Administrative Summary". On the left side, there is a sidebar menu with links: Administrative Summary, Administrative Statistics, Organizations, Queue Users, Disclosure Imports, and Disclosure Imports History. The Organizations link is highlighted with a red box. The main content area includes a dropdown menu for "Origin Organizations" with "-- Select --" as the current selection. At the bottom, there is a copyright notice: "Copyright © New Governance, Inc. 2000-2004, ALL RIGHTS RESERVED Version: 2.24".

4.4 REQUESTS TAB

The Requests tab allows the Privacy Specialist to access information about the activities requested by an individual or an organization. These activities can be performed when accessed by the following hyperlinks:

- Create New Request – initiate a request for a new disclosure activity
- Search for Request – look for a particular request
- Complaint – file a HIPAA grievance on behalf of a patient, against a person or an organization, and track as needed
- Disclosure – process a release of protected health information
- Disclosure Accounting – process a justification for a disclosure

The screenshot shows the PHIMT Requests Tab interface. At the top, there is a navigation bar with tabs for Patient, User, Admin, Requests, and Requester. The Requests tab is selected and circled in red. Below the navigation bar, the main content area is titled "Create New Request". On the left side, there is a sidebar menu with links: Create New Request and Search for a Request. Both links are highlighted with a red box. The main content area includes a section titled "Select Request Type" with three radio button options: Complaint, Disclosure, and Disclosure Accounting. The Disclosure Accounting option is selected. At the bottom, there is a "Next" button.

4.5 REQUESTER TAB

The Requester tab allows the Regular User to access information about the individual or agency making a request for the disclosure. These activities can be performed when accessed by the following hyperlinks:

- Requester Summary – view a synopsis of all requests you initiated or those initiated by an individual or organization
- Requester Requests – view a listing of all requests you made or those made by an individual or organization
- Requester Profile – view information about the individual or organization making the request
- Requester Search – search for individual or organization making a request.

Tuesday, February 15, 2005

Patient Search Logout

Patient User Admin Requests Requester

Current Requester: None

Requester Summary
Requester Requests
Requester Profile
Requester Search

Requester Search

Choose one of the following options:

A. Select a Third-Party Organization (a third-party requester, such as a law enforcement agency or insurance company)

Law Offices of Joe Gibbs, 1411 Jefferson Davis, Arlington, VA 20220 [Select]

B. Search for a Person (search for another person, or add a new one*)

Name (Last) (First) An '*' may be used as a wildcard.

System ID (the identification number created by this system for the person)

FMP-SSN (an external identifier for the person)

☒ Include Patient Records
☒ Include Non-Patient Records

[Search]

C. Search for an Organization (search for another organization, or add a new one*)

Name (All or part of the name of the organization. An '*' may be used as a wildcard.)

DMIS Code (the external identifier for the organization)

[Search]

5.0 UNDERSTANDING PHIMT SCREENS

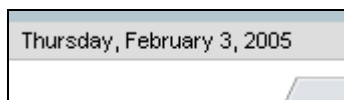
Each tab of the PHIMT screens contains some basic information that will be helpful to you when performing the various activities.

5.1 SCREEN FEATURES

There are many features to the PHIMT screen that you can use to navigate your way through the many disclosure activities you will perform. These features are discussed here.

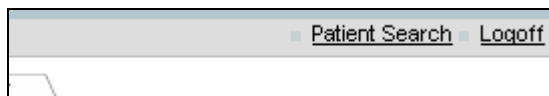
5.1.1 Date

The date displays the current weekday, month, day, and year in the upper left corner of the PHIMT screen.



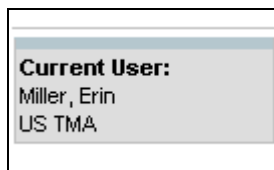
5.1.2 Navigational Options

Navigational options, such as patient search and logoff, provide directional hyperlinks that will help you to proceed through the PHIMT application. They are located in the upper right hand corner of the PHIMT screen.



5.1.3 Status Box

The gray status box shows current information and is located in the upper left hand corner of all PHIMT screens. The box displays the current user, user information such as organization and assigned role, patient information, and information about what disclosure activity is currently being performed. This information is updated when making inputs for various activities.



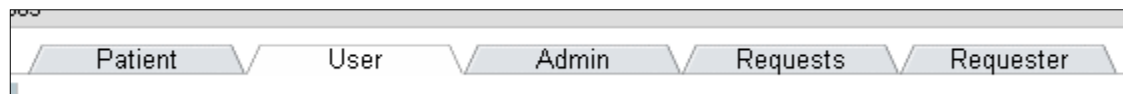
5.1.4 Activity Hyperlinks

The activity hyperlinks are located under the status box, on the left hand side of the PHIMT screen. This listing consists of hyperlinks for activities that can be performed while in a specific “tab.” The hyperlinks may include: my worklist, patient profile, or authorization; depending on which tab you are using. Your user role will determine specific hyperlinks listed.



5.1.5 PHIMT Screen Tabs

PHIMT screen tabs are labels that are located at the top of the display screen. The tabs serve as file folders for different groupings of activities. The specific tabs will vary depending on what role you are assigned. Privacy Specialist tabs includes: User, Patient, Admin, Requests, and Requester. Each tab allows for different activities.



5.1.6 Screen Title

The screen title is located directly under the tabs and above the display screen. This is the title of the particular screen being displayed (ex. user worklist, patient search results).



5.1.7 Display Screen/Application Window

The display screen/application window is the PHIMT users work area. These screens contain various fields in which to provide required information for proceeding through the PHIMT activities. To assist with data input, PHIMT provides text boxes, windows, calendar icons, and drop down menus. All features may not be on a particular user screen:

- *Radio buttons* – Radio buttons appear as black dots to indicate selection. You can toggle the buttons between selected and not selected.

- *Check marks* – Check marks are used to indicate a done or un-done status. You can toggle the marks between checked and unchecked.
- *Drop down menus* – Drop down menus provide the user with a list of possible selections from which to choose. Clicking on a particular selection causes it to be selected and appear in the “window.” You can change a selection by clicking the arrow on the menu box and then clicking on a different item.
- *Text boxes* – Text boxes are empty fields in which you can provide information. At times, this data is requested as additional comments or for supplemental information.
- *Calendar icons* – Calendar icons are provided to make it easier for you to input required dates. Date inputs are specific dates chosen by you to clarify time limits on various PHIMT activities. Choose a date by selecting the arrow in the date window. A calendar icon appears for easy inputs. Click on the desired date or use the arrows near the month and year headings to display a date not currently shown. The date you select will appear in the date window.
- *Action buttons* – Action buttons are used to guide you through the PHIMT steps and processes. Click on these buttons to proceed through various activities. Examples of these buttons include: Next, Save, Create, and Update.

NOTE: These features will be discussed when they are used in an activity.

5.2 PHIMT ERROR MESSAGES

PHIMT issues error messages when an entry or selection is not appropriate or complete. The message begins “Error(s) have occurred” and then follows with a bulleted list of the errors. For example, if you try to route an activity to someone who does not have access to that information, or you are not authorized to route the information to that particular person, PHIMT will display a message that indicating that you do not have the authority to perform that task. If you have not provided information for all the required data fields, PHIMT will issue a message indicating that information is missing. Once the error has been corrected, you can proceed to the next step in the PHIMT activity.

6.0 USER TAB ACTIVITIES

The hyperlinks on the User tab allow you to perform “desk duties” such as updating your user profile information, viewing requests you have made, and viewing your tasks, and switching your organization. A discussion on using the User tab hyperlinks follows.

6.1 MY PROFILE

The My Profile hyperlink brings you to the User Profile screen (shown below). This screen allows you to update or change your personal information such as: password, phone number, email address, signature block (used for personal or professional titles and credentials) and provide

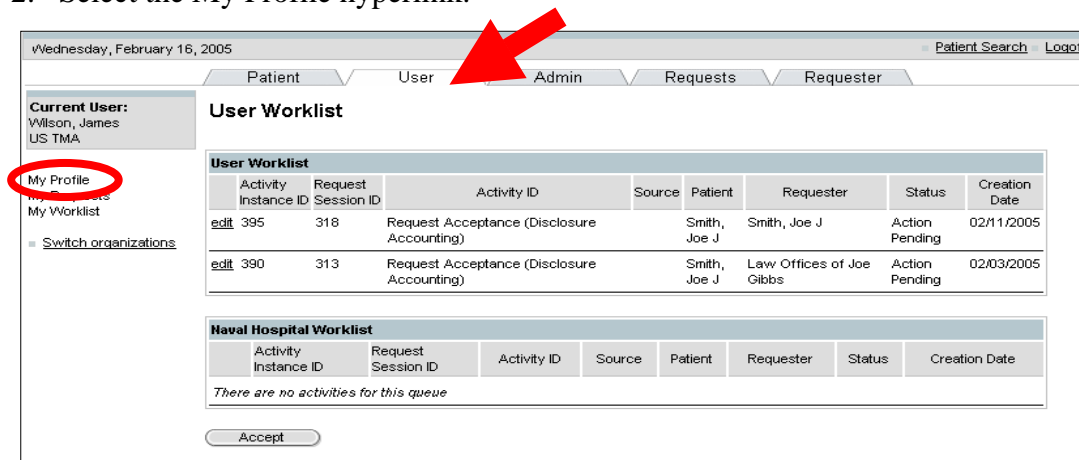
additional comments. Note the area for user roles, located on the bottom of the screen is not active. Only the User Admin has authorization to perform that activity. You also cannot change your User or system ID, user-to-user relationships, or user roles. The User Admin manages those. However, you can change backup person relationships (discussed later in the guide).

NOTE: When entering a phone number, remember that it will display on all correspondence when generated.

NOTE: PHIMT contains profiles for all users within the system. It is important to keep your personal information up to date. Therefore, you should update all personal information as it changes.

To update your user profile:

1. Select the User Tab.
2. Select the My Profile hyperlink.



Wednesday, February 16, 2005 Patient Search Logoff

Patient User Admin Requests Requester

Current User:
VWilson, James
US TMA

User Worklist

Activity Instance ID	Request Session ID	Activity ID	Source	Patient	Requester	Status	Creation Date
edit 395	318	Request Acceptance (Disclosure Accounting)		Smith, Joe J	Smith, Joe J	Action Pending	02/11/2005
edit 390	313	Request Acceptance (Disclosure Accounting)		Smith, Joe J	Law Offices of Joe Gibbs	Action Pending	02/03/2005

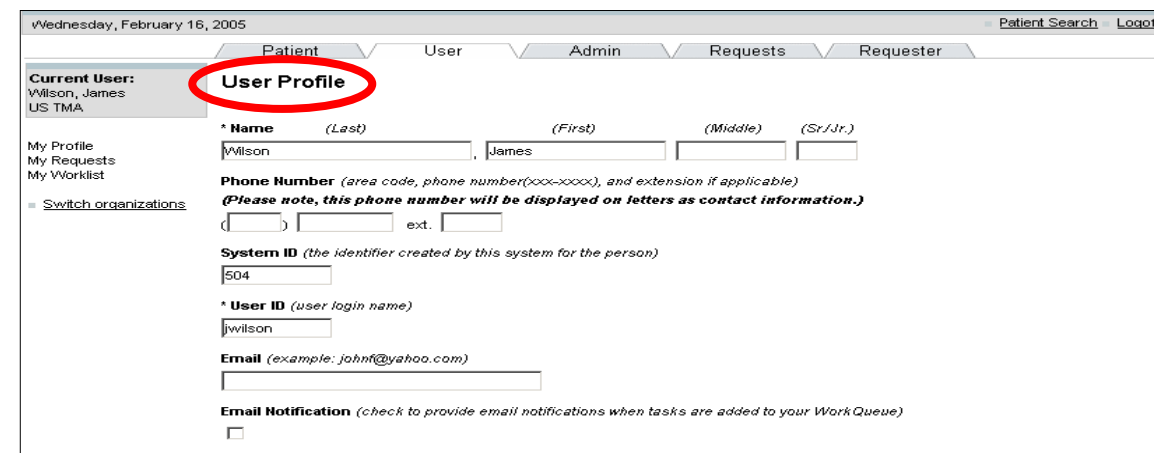
Naval Hospital Worklist

Activity Instance ID	Request Session ID	Activity ID	Source	Patient	Requester	Status	Creation Date
There are no activities for this queue							

[Accept](#)

My Profile
My Requests
My Worklist
[Switch organizations](#)

3. Enter your updated information in the information fields. (Changes can be made to any of the fields in the User Profile screen, except the System ID).



Wednesday, February 16, 2005 Patient Search Logoff

Patient User Admin Requests Requester

Current User:
VWilson, James
US TMA

User Profile

* Name (Last) (First) (Middle) (Sr./Jr.)

Phone Number (area code, phone number(XXX-XXXX), and extension if applicable)
 (Please note, this phone number will be displayed on letters as contact information.)
 ext.

System ID (the identifier created by this system for the person)

* User ID (user login name)

Email (example: johnf@yahoo.com)

Email Notification (check to provide email notifications when tasks are added to your WorkQueue)
☐

My Profile
My Requests
My Worklist
[Switch organizations](#)

4. Click on the Update button.

Old Password (User's current password.)

New Password

Confirm New Password

Signature Block (Please note, this text will display in a letter's signature block.)

Comments (general comments about or for the user)

User Roles				
Organization	Privacy Specialist	Regular User	User Admin	Primary
US TMA	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Update

- Your new information will appear in the appropriate fields.

6.2 MY REQUESTS

The My Requests hyperlink brings you to the User Requests screen that allows you to view all PHIMT activity requests that you have made. To view a detailed summary of a specific request, select the Request Session ID.

6.3 MY WORKLIST

The My Worklist hyperlink brings you to the User Worklist screen (shown below) and allows you to view and process all requests that have a task currently assigned to you. My Worklist serves as your electronic inbox. You should review your User Worklist to verify any tasks that have been assigned to you. To view more information on a particular activity, select the Instance ID for that activity.

Wednesday, February 16, 2005 Patient Search Logoff

Current User: Wilson, James US TMA

My Profile My Worklist Switch organizations

User Worklist

Activity Instance ID	Request Session ID	Activity ID	Source	Patient	Requester	Status	Creation Date
edit 395	318	Request Acceptance (Disclosure Accounting)		Smith, Joe J	Smith, Joe J	Action Pending	02/11/2005
edit 390	313	Request Acceptance (Disclosure Accounting)		Smith, Joe J	Law Offices of Joe Gibbs	Action Pending	02/03/2005

Naval Hospital Worklist

Activity Instance ID	Request Session ID	Activity ID	Source	Patient	Requester	Status	Creation Date
There are no activities for this queue							

Accept

6.4 SWITCH ORGANIZATIONS

Switch Organizations brings you to the Organization Search Results screen (shown below) and allows you to switch the status of your primary facility to a different facility, if you are assigned to more than one organization. For example, if you wanted to change your primary organization from US Primary Training Organization to TMA Clinical; just select the radio button next to the desired selection, and choose Select. Your primary status change will be displayed in the status box.

To switch your organization:

1. Select the Switch Organizations hyperlink on the User Tab.
2. Select the organization you want using the radio button.
3. Click on the Select button.

Thursday, February 17, 2005 Patient Search Logoff

Patient User Admin Requests Requester

Current User:
Munk, Jerry
TMA Clinical

My Profile
My Requests
My Worklist
Switch organizations

Organization Search Results

ID	Name	Address
<input type="radio"/> 1275	TMA Clinical	22 King St., Arlington, VA 22345
<input checked="" type="radio"/> 1118	US Primary Training Organization	Skyline Pl., Falls Church, VA 20110

Select

- The Organization Search Results screen now shows the radio button located near the facility you selected. The new selection is also reflected in the status box.

Thursday, February 17, 2005 Patient Search Logoff

Patient User Admin Requests Requester

Current User:
Munk, Jerry
US Primary Training Organization

My Profile
My Requests
My Worklist
Switch organizations

Organization Search Results

ID	Name	Address
<input checked="" type="radio"/> 1275	TMA Clinical	22 King St., Arlington, VA 22345
<input type="radio"/> 1118	US Primary Training Organization	Skyline Pl., Falls Church, VA 20110

Select

7.0 PATIENT TAB ACTIVITIES

The Patient tab allows you to view summaries, make requests, record disclosures; and create accounting suspensions, disclosure restrictions, authorizations, and patient profiles. It also allows you to search for patients. Two of the most common activities performed on the Patient tab are Patient Search and Create Patient. We will focus on these two activities here. The more complex Privacy Specialist activities using the Patient tab will be discussed in the Privacy Specialist Activities section.

7.1 PATIENT SEARCH

PHIMT allows you to use its search feature to find a patient that has already been added to the system.

To search for a patient:

1. Select the Patient Tab.
2. Enter the search criteria. (You can search for a patient by the Family Member Prefix (FMP) Sponsor's SSN or by the patient's name).

(NOTE: If you do not know how to spell the last name, just enter the first few letters and an asterisk. PHIMT will find the correct spelling).

3. Click on the Search button.

Wednesday, February 16, 2005 Patient Search Logoff

Patient User Admin Requests Requester

Current Patient: None

Summary
Requests
Record Disclosure
Accounting Suspensions
Disclosure Restrictions
Authorization
Patient Profile

■ Patient Search

Patient Search

FMP-SSN (Family Member Prefix and Sponsor SSN (in xx-xxx-xx-xxxx format))

20 - 121 - 13 - 1414

- OR -

by Name (Last) (First)

,

- OR -

by System ID (the identifier created by this system for the person)

Search

4. Select the patient from the Patient Search Results screen.

5. Click on the Select button.

Wednesday, February 16, 2005 Patient Search Logoff

Patient User Admin Requests Requester

Current Patient:
None

Patient Search Results

Search Results for FMP-SSN = ['20-121131414'] (sorted by birth date)

ID	FMP	Name	SSN	Birth Date	Address
292	20	Smith, Joe J	121131414	1968-07-05	23 King St. Charleston, SC 84536

FMP-SSN 20-121131414 (2004-07-20 to 2004-07-20)

Select

Other options:
[Adjust your search criteria and try again.](#)
[Create a new Patient record.](#)

Summary
Requests
Record Disclosure
Accounting Suspensions
Disclosure Restrictions
Authorization
Patient Profile

■ Patient Search

- The Patient Summary Screen appears and the current patient is displayed in the status box.

Wednesday, February 16, 2005 Patient Search Logoff

Patient User Admin Requests Requester

Current Patient:
Smith, Joe J
07/05/1968
FMP-SSN: 20-121131414

Summary

An alternate address exists for this patient.

Summary Item Filters Display

☐ All ☐ Disclosures ☐ Suspensions ☐ Restrictions ☐ Reports ☐ Letters ☐ Authorizations ☐ Complaints

Summary
Requests
Record Disclosure
Accounting Suspensions
Disclosure Restrictions
Authorization
Patient Profile

■ Patient Search

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7.2 CREATE PATIENTS

When adding a new patient record, conduct a search within the system initially to ensure that the patient does not already exist. Patient records must be added to the system before disclosures, authorizations or restrictions can be documented.

To create a patient:

- Select the Patient Tab.
- Select the Patient Search hyperlink.

Wednesday, February 16, 2005

Patient Search Logoff

Patient User Admin Requests Requester

Current Patient:
Smith, Joe J
07/05/1968
FMP-SSSN: 20-121131414

Summary
Requests
Record Disclosure
Accounting Suspensions
Disclosure Restrictions
Authorization
Patient Profile

Summary
An alternate address exists for this patient.

Summary Item Filters Display
☐ All ☐ Disclosures ☐ Suspensions ☐ Restrictions ☐ Reports ☐ Letters ☐ Authorizations ☐ Complaints

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Version: 2.24

Patient Search

3. Enter the patient search criteria. (You can search for a patient by the Family Member Prefix (FMP) Sponsor's SSN or by the patient's name).

***NOTE:** If you do not know how to spell the last name, just enter the first few letters and an asterisk. PHIMT will find the correct spelling.*

4. Click on the Search button.

Wednesday, February 16, 2005

Patient Search Logoff

Patient User Admin Requests Requester

Current Patient:
Smith, Joe J
07/05/1968
FMP-SSSN: 20-121131414

Summary
Requests
Record Disclosure
Accounting Suspensions
Disclosure Restrictions
Authorization
Patient Profile

Patient Search

Use the current person:
Name: Joe Smith
SSN #: 121131414
Birth Date: 07-05-1968
Address: 23 King St., Charleston, SC 84536

OK

- OR -

Search for another person:

FMP-SSSN (Family Member Prefix and Sponsor SSN (in xxx-xxxx-xxxx format))
 - - -

- OR -

by Name (Last) (First)
 ,

- OR -

by System ID (the identifier created by this system for the person)

Search

5. If no results matched your search, select the Create a New Patient Record hyperlink.

Wednesday, February 16, 2005

Patient Search Logoff

Patient User Admin Requests Requester

Current Patient:
Smith, Joe J
07/05/1968
FMP-SSSN: 20-121131414

Summary
Requests
Record Disclosure
Accounting Suspensions
Disclosure Restrictions
Authorization
Patient Profile

Patient Search Results

Search Results (sorted by birth date)

ID	Name	SSN	Birth Date	Address
There were no results that matched your search criteria.				

Other options:
 Add a new record and try again.
[Create a new Patient record.](#)

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6. Enter the patient's information: (name, type, SSN, birth date, email, FMP-SSSN).
7. Click on the Save button.

Wednesday, February 16, 2005

Patient User Admin Requests Requester

Current Patient:
Smith, Joe J
07/05/1968
FMP-SSSN: 20-121131414

Summary
Requests
Record Disclosure
Accounting Suspensions
Disclosure Restrictions
Authorization
Patient Profile

[Patient Search](#)

Person Details

* **Name** (Last) (First) (Middle) (Sr./Jr.)
Fernandez, Katalina

* **Type**
Patient

* **SSN** (in ###-##-#### format, enter '000-00-0000' if not known)
243 - 23 - 4536

* **System ID** (the identifier created by this system for the person)
0

* **Birth Date** (birth date in MM/DD/YYYY format)
12 / 23 / 1979

* **Email** (example: johnf@yahoo.com)
johnf@yahoo.com

* **FMP-SSSN** (Family Member Prefix and Sponsor SSN (in xx-xxx-xx-xxxx format))
20 - 123 - 12 - 1312

Alternate Communication Instructions (special instructions to send correspondence to the person)

Comments (general comments about or for the person)

Save

8. Enter the Address Details (USA or International format).
9. Click on the Save button.

Wednesday, February 16, 2005

Patient User Admin Requests

Current Patient:
Smith, Joe J
07/05/1968
FMP-SSSN: 20-121131414

Summary
Requests
Record Disclosure
Accounting Suspensions
Disclosure Restrictions
Authorization
Patient Profile

[Patient Search](#)

Address Details

Address Format (APO and FPO address should use USA format)
USA ☒ International ☐

* **Address Line 1** (the primary address line)
23 Baily Street

* **Address Line 2** (normally a suite or apartment)

* **City** (city name, or APO or FPO)
Alexandria

* **State** (two character state identifier: IL, MN, CO, etc., or AA, AE, AP for APO/FPO)
VA

* **Postal Code** (USA: #####-####)
22345 -

Comments (general comments about or for the address)

Save

Wednesday, February 16, 2005

Patient User Admin Requests

Current Patient:
Smith, Joe J
07/05/1968
FMP-SSSN: 20-121131414

Summary
Requests
Record Disclosure
Accounting Suspensions
Disclosure Restrictions
Authorization
Patient Profile

[Patient Search](#)

Address Details

Address Format (APO and FPO address should use USA format)
USA ☐ International ☒

Country (country name)
Antigua

International Address Line 1

International Address Line 2

International Address Line 3

Comments (general comments about or for the address)

Save

- The patient summary screen for the new patient will appear. (The patient is brand new so no specific patient information will be displayed at this time.) The information is also displayed in the status box.

Wednesday, February 16, 2005 Patient Search Logoff

Patient User Admin Requests Requester

Current Patient:
Fernandez, Katalina
12/23/1979
FMP-SSSN: 20-
123121312

Summary

Summary Item Filters Display

☐ All ☐ Disclosures ☐ Suspensions ☐ Restrictions ☐ Reports ☐ Letters ☐ Authorizations ☐ Complaints

Summary
Requests
Record Disclosure
Accounting Suspensions
Disclosure Restrictions
Authorization
Patient Profile

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Version: 2.24

■ Patient Search

8.0 PRIVACY SPECIALIST ACTIVITIES

As a Privacy Specialist you are authorized to perform specific activities including: approving disclosures, approving accounting of disclosures, recording complaints, recording disclosure restrictions, generating authorizations, revoking authorizations, and performing accounting suspensions. Instructions for performing these activities are provided in this section.

8.1 RECORD DISCLOSURES

The Privacy Specialist can use either the Disclosure Request or the Disclosure hyperlink to record disclosures. The Disclosure Request allows for forwarding the disclosure for approval or denial. The Disclosure hyperlink allows for immediate approval or denial.

If you're using the Disclosure Request you can enter Action Requested from the Action drop down menu, route it to your own worklist for later approval/denial, or route it to another Privacy Specialist.

If you're using the disclosure hyperlink you can complete the Disclosure in the Disclosure Status Field. Select Save when you have completed all fields pertaining to the disclosure.

NOTE: The Disclosure Type and Disclosure Purpose cannot be set to Undefined.

To record a disclosure:

1. Select the Patient Tab.
2. Enter the patient search criteria. (You can search for a patient by the Family Member Prefix (FMP) Sponsor's SSN or by the patient's name).

3. Click on the Search button.
4. Select the patient from the Patient Search Results screen.
5. Click on the Select button.

The Patient Summary screen appears.

NOTE: The steps 1-5 for recording a disclosure are the same as steps 1-5 in section 7.1 Patient Search. Refer to section 7.1 Patient Search for screen displays of steps 1-5.

6. Select the Record Disclosure hyperlink on the Patient Summary screen.

Thursday, January 27, 2005 Patient Search Logoff

Patient User Admin Requests Requester

Current Patient:
Smith, Joe J
07/05/1968
FMP-SSSN: 20-
121131414

Summary
An alternate address exists for this patient.

Summary Item Filters Display

☐ All ☐ Disclosures ☐ Suspensions ☐ Restrictions ☐ Reports ☐ Letters ☐ Authorizations ☐ Complaints

Summary
Record Disclosure
Accounting Suspensions
Disclosure Restrictions
Authorization
Patient Profile

Patient Search

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7. Click on the Change button to change or update the requester.

Thursday, January 27, 2005 Patient Search Logoff

Patient User Admin Requests Requester

Current Patient:
Smith, Joe J
07/05/1968
FMP-SSSN: 20-
121131414

Record Disclosure

Requester (the organization or person requesting the disclosure) Change

Name:
Address:
Phone:
Contact Person:

Requester Authority (the authority of the requester)
Undefined

Request Form (the form of the disclosure request)
Undefined

Request Date (the disclosure request date in MM/DD/YYYY format)

8. Select the requester.

Thursday, January 27, 2005 Patient Search Logoff

Patient User Admin Requests Requester

Current Patient:
Smith, Joe J
07/05/1968
FMP-SSSN: 20-121131414

Summary
Requests
Record Disclosure
Accounting Suspensions
Disclosure Restrictions
Authorization
Patient Profile

Requester Search
Choose one of the following options:

A. Select the Patient (the request is being made by the Patient themselves)
Smith, Joe J

B. Select a Third-Party Organization (a third-party requester, such as a law enforcement agency or insurance company)
Law Offices of Joe Gibbs, 1411 Jefferson Davis, Arlington, VA 20220

C. Search for a Person (search for another person, or add a new one*)
Name (Last) (First) An * may be used as a wildcard.
System ID (the identification number created by this system for the person)
FMP-SSN (an external identifier for the person)
☒ Include Patient Records
☒ Include Non-Patient Records

D. Search for an Organization (search for another organization, or add a new one*)
Name (All or part of the name of the organization. An * may be used as a wildcard.)
DMIS Code (the external identifier for the organization)

9. Record the Disclosure details: requester authority, form, date, recipient, and disclosure type.

10. Select the Disclosure Status from the drop-down box.

Thursday, January 27, 2005 Patient Search Logoff

Patient User Admin Requests Requester

Current Patient:
Smith, Joe J
07/05/1968
FMP-SSSN: 20-121131414

Summary
Requests
Record Disclosure
Accounting Suspensions
Disclosure Restrictions
Authorization
Patient Profile

Record Disclosure

Requester (the organization or person requesting the disclosure)
Name: Smith, Joe J
Address: 23 King St., Charleston, SC 84536
Phone: (803) 435-6789
Contact Person:

Requester Authority (the authority of the requester)
Patient is Requester

Request Form (the form of the disclosure request)
Received Request in Writing

Request Date (the disclosure request date in MM/DD/YYYY format)
01/27/2005

*** Recipient** (the organization or person where the disclosure went)
Name: Law Offices of Joe Gibbs
Address: 1411 Jefferson Davis, Arlington, VA 20220
Phone:
Contact Person:

*** Disclosure Type** (the type of disclosure)
Law Enforcement Purposes

Disclosure Status (the status of the disclosure)
Pending
Cancelled
Complete
Pending
Undefined

Treatment Start Date (the treatment or service start date in MM/DD/YYYY format)

11. Scroll down the screen and enter: (disclosure date, origin organization, disclosure purpose, and PHI description).

Complete

* **Disclosure Date** (the disclosure date in MM/DD/YYYY format)
01/27/2005

Treatment Start Date (the treatment or service start date in MM/DD/YYYY format)
01/03/2005

Treatment End Date (the treatment or service end date in MM/DD/YYYY format)
01/06/2005

Treatment Identifier (the treatment or service identifier)

* **Origin Organization** (where the disclosure originated)
US TMA

* **Disclosure Purpose** (the purpose of the disclosure)
Law Enforcement

Other:

* **Protected Health Information Description** (the description of the Protected Health Information disclosed)
☒ Complete Health Record(s)
☐ Consultation Report(s)
☐ Discharge Summary
☐ History and Physical Examination
☐ Laboratory Test(s)
☐ Operative Report(s)
☐ Pathology Report(s)
☐ Progress Notes
Other:

12. Scroll down to the bottom of the screen and click on the Save button.

☐ Laboratory Test(s)
☐ Operative Report(s)
☐ Pathology Report(s)
☐ Progress Notes
Other:

Disclosure Comments (the INTERNAL comments for this disclosure - these do NOT show up in the Protected Health Information disclosure report)

Improper Disclosure (checked if this disclosure occurred improperly)
☐

Improper Disclosure Description (the details about the improper disclosure)

Improper Disclosure Mitigation (the details about how the improper disclosure was mitigated)

Save

- The disclosure is now complete and only the disclosure comments and improper fields can be updated.

Thursday, January 27, 2005 [Patient Search](#) [Logoff](#)

Patient User Admin Requests Requester

Current Patient:
Smith, Joe J
07/05/1968
FMP-SSSN-20-
121131414

Record Disclosure

This disclosure (ID #286) was created on 01/27/2005 at 11:09:57 AM EST, and last updated on 01/27/2005 at 11:09:57 AM EST.

Requester (the organization or person requesting the disclosure)
Name: Smith, Joe J
Address: 23 King St., Charleston, SC 84536
Phone: (803) 435-6789
Contact Person:

Requester Authority (the authority of the requester)
Patient is Requester

Request Form (the form of the disclosure request)
Received Request in Writing

Request Date (the disclosure request date in MM/DD/YYYY format)
01/27/2005

*** Recipient** (the organization or person where the disclosure went)
Name: Law Offices of Joe Gibbs
Address: 1411 Jefferson Davis, Arlington, VA 20220
Phone:
Contact Person:

Summary
Requests
Record Disclosure
Accounting Suspensions
Disclosure Restrictions
Authorization
Patient Profile

[Patient Search](#)

NOTE: To view the disclosure:

- Select the user tab
- Select My Requests hyperlink
- The disclosure is displayed in the User Request box
- To view specific details of the disclosure, select the Request Session ID for that particular request

NOTE: To Amend Disclosures:

Once a disclosure has a disclosure status of completed, the only way to amend it is by assigning it as an Improper Disclosure. For information on Improper Disclosures, see section 8.10 Amend Disclosures.

NOTE: Disclosures with Special Circumstances

When making multiple disclosures for the same patient, and for the same purpose, record all information in one disclosure record. Record the disclosure as stated in the previous steps using the following guidance.

Guidance for Completing Disclosure with Special Circumstances	
Data Field	Data to be Provided
Information Start Date	Provide the date for which the disclosure request begins
Information End Date	Leave blank if unknown or insert the date for one year later
Disclosure Date	Insert the date of the first disclosure
Treatment Start Date	Insert the date on which the treatment began
Treatment End Date	Leave blank
Disclosure Purpose/Other	Insert text to indicate the frequency of disclosure and the number of disclosures to be made in addition to any other pertinent information such as the name of the report it will support

If there is no end date be sure to report that there is no end date at this time and therefore the disclosure record will expire in one year. At that time, if the regular disclosures are still ongoing, then a new disclosure record will be created.

NOTE: Remember that the text entered in this field does appear on reports and correspondence generated by the PHIMT.

8.2 APPROVE DISCLOSURES

NOTE: Those disclosures recorded by you using the Record Disclosure hyperlink have already been approved. This approval activity is for those disclosures that were developed using the Record Disclosure wizard and routed to your worklist for later action.

To approve a disclosure:

1. Select the User Tab.
2. Select the My Worklist hyperlink.
3. Select the Edit hyperlink for the disclosure you want to approve.

Tuesday, January 25, 2005 Patient Search Logoff

Patient **User** Admin Requests Requester

Current User:
Wilson, James
US TMA

My Profile
My Requests
My Worklist
Switch organizations

User Worklist

Activity Instance ID	Request Session ID	Activity ID	Source	Patient	Requester	Status	Creation Date
369	291	Request Approval (Disclosure)	Kramer, Peter	Kramer, Peter	Action Pending	01/25/2005	

Naval Hospital Worklist

Activity Instance ID	Request Session ID	Activity ID	Source	Patient	Requester	Status	Creation Date
There are no activities for this queue							

Accept

4. Select Approved from the Activity Status drop-down box.
5. Click on the Update button.

The screenshot shows the 'Edit Request' form for Patient Peter Kramer. The 'Activity Status' dropdown menu is open, showing options: Approved, Action Pending, Denied, Cancelled, Route to Privacy Specialist, and Route to Other User. A red arrow points to 'Approved'. Below the dropdown is a text area for 'denied part'. Another red arrow points to the 'Update' button at the bottom of the form.

- The Edit Request screen appears. The approved request will display in the Request Activity History box. The status has been changed to Approved.

NOTE: The disclosure is no longer shown on your User Worklist.

The screenshot shows the 'Edit Request' screen for a disclosure request. The 'Request Activity History' table is highlighted with a red border. Below it is the 'Request Session Details' form.

Activity Instance ID	Request Session ID	Activity ID	Source	Patient Id	Requester Id	User	Status	Creation Date
369	291	Request Approval (Disclosure)		Kramer, Peter	Kramer, Peter	James Wilson	Approved	01/25/2005

Request Session Details

Description	Details
Request Type	Disclosure
Details of the Request	
Disclosure Type	Type: Law Enforcement Purposes, ID: 268, Date: 01/25/2005
Start Date	01/25/2005
End Date	02/25/2005
PHI Items	Complete Health Record(s)
Authority Verified	Patient is Requester
Verify Authority Text	Patient is requester
Identity Verified	Patient Identifier
Verify Identity Text	license
Route to Privacy Specialist	Yes
Request Classification	Medical
Request Format	Received Request in Writing

8.3 AMEND A DISCLOSURE

As a Privacy Specialist you are authorized to label a disclosure as Improper. Once a Disclosure status is marked as completed, it can only be amended by marking it as an Improper Disclosure, which means the disclosure was made incorrectly.

To amend a disclosure:

1. Select the Patient Tab.
2. Search for and select the patient.

Thursday, January 27, 2005 Patient Search Logoff

Patient User Admin Requests Requester

Current Patient:
None

Patient Search Results

Search Results for FMP-SSSN = [*20-121131414] (sorted by birth date)

ID	FMP	Name	SSN	Birth Date	Address
292	20	Smith, Joe J	121131414	1968-07-05	23 King St. Charleston, SC 84536

FMP-SSSN 20-121131414 (2004-07-20 to 2004-07-20)

Select

Other options:
[Adjust your search criteria and try again.](#)
[Create a new Patient record.](#)

3. Place a check in the Disclosures box and click on the Display button.

Thursday, January 27, 2005 Patient Search Logoff

Patient User Admin Requests Requester

Current Patient:
Smith, Joe J
07/05/1968
FMP-SSSN: 20-121131414

Summary

An alternate address exists for this patient.

Summary Item Filters Display

☐ All ☒ Disclosures ☐ Suspensions ☐ Restrictions ☐ Reports ☐ Letters ☐ Authorizations ☐ Complaints

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Version: 2.24

4. Select the ID hyperlink for the disclosure that you want to amend.

Current Patient:
Smith, Joe J
07/05/1968
FMP-SSSN:20-121131414

Summary
An alternate address exists for this patient.

Summary Item Filters Display
☐ All ☒ Disclosures ☐ Suspensions ☐ Restrictions ☐ Reports ☐ Letters ☐ Authorizations ☐ Complaints

Disclosures (Suspended disclosures are highlighted in red)

ID	Date	Type	Origin	Received By	Protected Health Information	Purpose	Status
286	01/27/2005	Law Enforcement Purposes	US TMA	Law Offices of Joe Gibbs	Complete Health Record(s)	Law Enforcement	Complete
137	07/27/2004	Law Enforcement Purposes	325th Medical Group	Joe J Smith	Laboratory Test(s)	Law Enforcement	Complete
100	07/20/2004	Research Purposes	325th Medical Group	Home of Michele	History and Physical Examination, Progress Notes	Medical	Complete

- The Record Disclosure screen will display.

Thursday, January 27, 2005 [Patient Search](#) [Logout](#)

Current Patient:
Smith, Joe J
07/05/1968
FMP-SSSN:20-121131414

Record Disclosure

This disclosure (ID #286) was created on 01/27/2005 at 11:09:57 AM EST, and last updated on 01/27/2005 at 11:09:57 AM EST.

Requester (the organization or person requesting the disclosure)
 Name: Smith, Joe J
 Address: 23 King St., Charleston, SC 84536
 Phone: (803) 435-6789
 Contact Person:

Requester Authority (the authority of the requester)
 Patient is Requester

Request Form (the form of the disclosure request)
 Received Request in Writing

Request Date (the disclosure request date in MM/DD/YYYY format)
 01/27/2005

*** Recipient** (the organization or person where the disclosure went)
 Name: Law Offices of Joe Gibbs
 Address: 1411 Jefferson Davis, Arlington, VA 20220
 Phone:
 Contact Person:

5. Scroll to the bottom of the screen and place a check in the Improper Disclosure checkbox.
6. Enter a description of the Improper Disclosure and mitigation.

- Click on the Update button.

Disclosure Comments *(the INTERNAL comments for this disclosure – these do NOT show up in the Protected Health Information disclosure report)*

Improper Disclosure *(checked if this disclosure occurred improperly)*

☒

Improper Disclosure Description *(the details about the improper disclosure)*

sent to wrong address

Improper Disclosure Mitigation *(the details about how the improper disclosure was mitigated)*

Privacy Officer spoke with patient.

Update

8.4 RECORD A REQUEST FOR AN ACCOUNTING OF DISCLOSURES

An individual has a right to receive an accounting of disclosures of protected health information made by a covered entity in the 6 years prior to the date that the accounting is requested– DoD 6025.18-R Chapter 13.

Both Regular Users and Privacy Specialists can record a request for an accounting of disclosures, but only Privacy Specialists can approve or deny the request.

To record a request for an accounting of disclosures:

- Select the Requests Tab.
- Select the Create New Request hyperlink and/or click on the radio button for Disclosure Accounting.
- Click on the Next button.

Thursday, January 27, 2005

Patient Search Logoff

Patient User Admin Requests Requester

Current Request: None

Create New Request

Select Request Type

[Create New Request](#)

[Search for a Request](#)

☐ Complaint

☐ Disclosure

☒ Disclosure Accounting

Next

4. Search for or select the patient.
5. Click on the OK button.

Thursday, January 27, 2005 [Patient Search](#) [Logout](#)

Current Request:
Disclosure Accounting

■ Create New Request
■ Search for a Request

Patient Search

Use the current person:
Name: Joe Smith
SSN #: 121131414
Birth Date: 07-05-1968
Address: 23 King St., Charleston, SC 84536

OK

- OR -

Search for another person:

FMP-SSSN (Family Member Prefix and Sponsor SSN (in xx-xxxx-xx-xxxx format))
[] - [] - [] - []

- OR -

by Name (Last) (First)
[] , []

- OR -

by System ID (the identifier created by this system for the person)
[]

Search

6. Select the Requester.

Thursday, January 27, 2005 [Patient Search](#) [Logout](#)

Current Request:
Disclosure Accounting

■ Create New Request
■ Search for a Request

Requester Search

Choose one of the following options:

A. Select the Patient (the request is being made by the Patient themselves)
[Smith, Joe J] **Select**

B. Select a Third-Party Organization (a third-party requester, such as a law enforcement agency or insurance company)
[Law Offices of Joe Gibbs, 1411 Jefferson Davis, Arlington, VA 20220] **Select**

C. Search for a Person (search for another person, or add a new one*)
Name (Last) (First) An "*" may be used as a wildcard.
[] , []
System ID (the identification number created by this system for the person)
[]
FMP-SSSN (an external identifier for the person)
[]
☒ Include Patient Records
☒ Include Non-Patient Records
Search

D. Search for an Organization (search for another organization, or add a new one*)
Name (All or part of the name of the organization. An "*" may be used as a wildcard.)
[]

7. Confirm the requester and recipient details.
8. Click on the Next button.

Thursday, January 27, 2005 Patient Search Logoff

Patient User Admin Requests Requester

Select Patient Select Requester Request Details Request Action

1 2 3 4

Current Request:
Disclosure Accounting

Create New Request
Search for a Request

Confirm Requester and Recipient Details

Patient: Joe J. Smith
Date of Birth: 1968-07-05
SSN: 121131414
Address: 23 King St., Charleston, SC 84536

Requester: Joe J. Smith [change](#)
Address: 23 King St., Charleston, SC 84536 [Add New](#)

Recipient: Same as requester
[set a different recipient](#)

[Back](#) [Next](#)

9. Enter the Request Details: (details of the request, identity verification, authority verification).
10. Scroll down the screen and enter: (Information start and end date, request format, and request classification).
11. Click on the Next button.

Requester Authority Verified (was the requester's authority to access information verified?)
Patient is Requester

Description of Requester Authority Verification (if the requester's authority was verified, how was it verified?)
Patient is requester

Information Start Date (the start date for the information in MM/DD/YYYY format)
12/15/2004

Information End Date (the end date for the information in MM/DD/YYYY format)
01/20/2005

Request Format (the format in which this request has been received)
Received Request in Writing

Request Classification (an optional classification for this request)
Attorney

[Back](#) [Next](#)

12. Enter in the Request Action Details.
13. From the Action Drop-down box, select the appropriate person to route the request to.

14. Click on the Save button.

Thursday, January 27, 2005 Patient Search Logoff

Patient User Admin Requests Requester

Current Request: Disclosure Accounting

1 Select Patient 2 Select Requester 3 Request Details 4 Request Action

Request Action

Patient
Name: Joe Smith
SSN #: 121131414
Birth Date: 07-05-1968
Address: 23 King St., Charleston, SC 84536

Requester/Recipient
Name: Joe J Smith
Address: 23 King St., Charleston, SC 84536

Details of the Request (requester's comments about the scope of this request)
 Patient is requesting an accounting of disclosures.

Approved Part (for partially approved requests, describe part of request that was approved)

Denied Part (for partially denied requests, describe part of request that was denied)

Action (action for this request)

- The Request Summary screen will display.

Thursday, January 27, 2005 Patient Search Logoff

Patient User Admin Requests Requester

Current Request: Disclosure Accounting

Summary
 History
 Documents
 Request Details
 Request Action

Request Summary

Patient
Name: Joe J Smith
SSN #: 121131414
Birth Date: 07-05-1968
Address: 23 King St., Charleston, SC 84536

Requester/Recipient
Name: Joe J Smith
Address: 23 King St., Charleston, SC 84536

Request Status: Routed Request For Acceptance

Request Creation Date: 01/27/2005 at 04:28:01 PM EST

Request Last Update Date: 01/27/2005 at 04:28:01 PM EST

Other Request Details	
Description	Details
Request Type	Disclosure Accounting
Details of the Request	Patient is requesting an accounting of disclosures.
Start Date	12/15/2004
End Date	01/20/2005
Authority Verified	Patient is Requester
Verify Authority Text	Patient is requester

8.5 APPROVE ACCOUNTING OF DISCLOSURES

A patient may ask for an Accounting of Disclosures at any time. PHIMT allows for a quick reporting of this accounting.

The Request Action window provides you with various accounting disclosure actions, which are shown in this table:

Accounting for Disclosures - Request Actions	
Action	Description
Route to My Worklist	Allows you to place it on your worklist to follow up when appropriate
Process Request Now	Allows you to place it in your worklist for approval
Deny Request Now	Allows you to deny the disclosure
Route to Privacy Specialist	Allows you to pass the disclosure on to another Privacy Specialist to be processed, as established in a User-to-User Relationship
Route to Other User	Allows you to pass the disclosure back to another user to process the letter generation after approving or denying the request, as established in a User-to-User Relationship

To approve an accounting of a disclosure:

1. Select the User Tab.
2. Select the My Worklist hyperlink.
3. Select the Edit hyperlink for the disclosure accounting that you want to approve.

Thursday, January 27, 2005 Patient Search Logoff

Patient **User** Admin Requests Requester

Current User:
Wilson, James
US TMA

My Profile
My Request
My Worklist
Switch organizations

User Worklist

Activity Instance ID	Request Session ID	Activity ID	Source	Patient	Requester	Status	Creation Date
85	308	Request Acceptance (Disclosure Accounting)		Smith, Joe J	Smith, Joe J	Action Pending	01/27/2005

Naval Hospital Worklist

Activity Instance ID	Request Session ID	Activity ID	Source	Patient	Requester	Status	Creation Date
There are no activities for this queue							

Accept

- The Edit Activity Details screen will display.
4. Select Accepted from the Activity Status drop-down box.

5. Click on the Update button.

Thursday, January 27, 2005 Patient Search Logoff

Patient User Admin Requests Requester

Current Request:
Disclosure Accounting

Edit Activity Details

Patient
Name: Joe Smith
SSN #: 121131414
Birth Date: 07-05-1968
Address: 23 King St., Charleston, SC 84536

Requester/Recipient
Name: Joe J Smith
Address: 23 King St., Charleston, SC 84536

Instructions
Request Acceptance (Disclosure Accounting)

Activity Status (new activity status code)
Accepted
Action Pending
Denied
Cancelled
Route to Privacy Specialist
Route to Other User

Comments (enter details about this activity)

Update

- The Disclosure Accounting Request screen will display with the approved accounting of disclosures.

NOTE: The accounting disclosure (Activity Instance ID 76) is no longer shown on your User Worklist

Thursday, January 27, 2005 Patient Search Logoff

Patient User Admin Requests Requester

Current Request:
Disclosure Accounting

Disclosure Accounting Request

Reportable Disclosures (checked disclosures will be included in the disclosure accounting report, suspended disclosures are highlighted in red)

Include	Disclosure ID	Date	Type	Origin	Receiving Entity	PHI	Purpose	Status
<input checked="" type="checkbox"/>	286	01/27/2005	Law Enforcement Purposes	US TMA	Law Offices of Joe Gibbs	Complete Health Record(s)	Law Enforcement	Complete
<input checked="" type="checkbox"/>	137	07/27/2004	Law Enforcement Purposes	325th Medical Group	Joe J Smith	Laboratory Test(s)	Law Enforcement	Complete
<input checked="" type="checkbox"/>	100	07/20/2004	Research Purposes	325th Medical Group	Home of Michele	History and Physical Examination, Progress Notes	Medical	Complete

Disclosures Accounting Suspensions

Suspension ID	Suspended Disclosure	Identifier	Start Date	End Date	Comments
26	The specific disclosure of type Law Enforcement Purposes that occurred on 07/27/2004 with a disclosure ID of 137		07/27/2004	07/27/2004	

Create

8.6 GENERATE AN ACCOUNTING OF DISCLOSURES REPORT

An accounting of disclosures report is a summary of all of the disclosures made for a particular patient. Once a request has been approved, an accounting of disclosures report can be generated.

The Privacy Specialist has the option to route the report back to the originator. Pending disclosures will not display in the report.

To generate an Accounting of Disclosures Report:

1. From the Disclosure Accounting Request screen, click on the Create button to generate the report.

Thursday, January 27, 2005

Patient User Admin Requests Requester

Current Request:
Disclosure Accounting

Summary
History
Documents
Request Details
Request Action

Create New Request
Search for a Request

Disclosure Accounting Request

Reportable Disclosures (checked disclosures will be included in the disclosure accounting report, suspended disclosures are highlighted in red)

Include	Disclosure ID	Date	Type	Origin	Receiving Entity	PHI	Purpose	Status
<input checked="" type="checkbox"/>	286	01/27/2005	Law Enforcement Purposes	US TMA	Law Offices of Joe Gibbs	Complete Health Record(s)	Law Enforcement	Complete
<input checked="" type="checkbox"/>	137	07/27/2004	Law Enforcement Purposes	325th Medical Group	Joe J Smith	Laboratory Test(s)	Law Enforcement	Complete
<input checked="" type="checkbox"/>	100	07/20/2004	Research Purposes	325th Medical Group	Home of Michele	History and Physical Examination, Progress Notes	Medical	Complete

Disclosures Accounting Suspensions

Suspension ID	Suspended Disclosure	Identifier	Start Date	End Date	Comments
28	The specific disclosure of type Law Enforcement Purposes that occurred on 07/27/2004 with a disclosure ID of 137		07/27/2004	07/27/2004	

Create

2. Select the Protected Health Information Disclosure hyperlink to create the report.

NOTE: If you want to route the completed request back to the originator, place a check in the box and click on [Confirm](#).

Thursday, January 27, 2005

Patient User Admin Requests Requester

Current Request:
Disclosure Accounting

Summary
History
Documents
Request Details
Request Action

Create New Request
Search for a Request

Disclosure Accounting Request

Disclosure Accounting Request (click below to view or print the document)

[Protected Health Information Disclosure Report](#)

Route Completed Request to Originator (route to the request creator for acknowledgement & document preparation)

☐

Confirm

3. The Accounting of Disclosures Report will display.

Protected Health Information Disclosure Report Prepared for: Joe J Smith Requested from: US TMA Generated on: 01-27-2005	
Disclosure ID:	286
Date:	2005-01-27
Disclosure Type:	Law Enforcement Purposes - Law Enforcement Purposes
Disclosure Purpose:	Law Enforcement
Disclosed Health Information:	Complete Health Record(s)
Disclosure Originated From:	US TMA Five Skyline Place, 5111 Leesburg Pike, Falls Church, VA 22041-3206
Disclosure Recipient:	Law Offices of Joe Gibbs 1411 Jefferson Davis, Arlington, VA 20220
Disclosure Requester:	Smith, Joe J 23 King St., Charleston, SC 84536
Disclosure ID:	137

8.7 CREATE A SUSPENSION

The covered entity shall temporarily suspend an individual's right to receive an accounting of disclosures to a health oversight agency or law enforcement official...DoD 6025.18-R C13.1.2.1

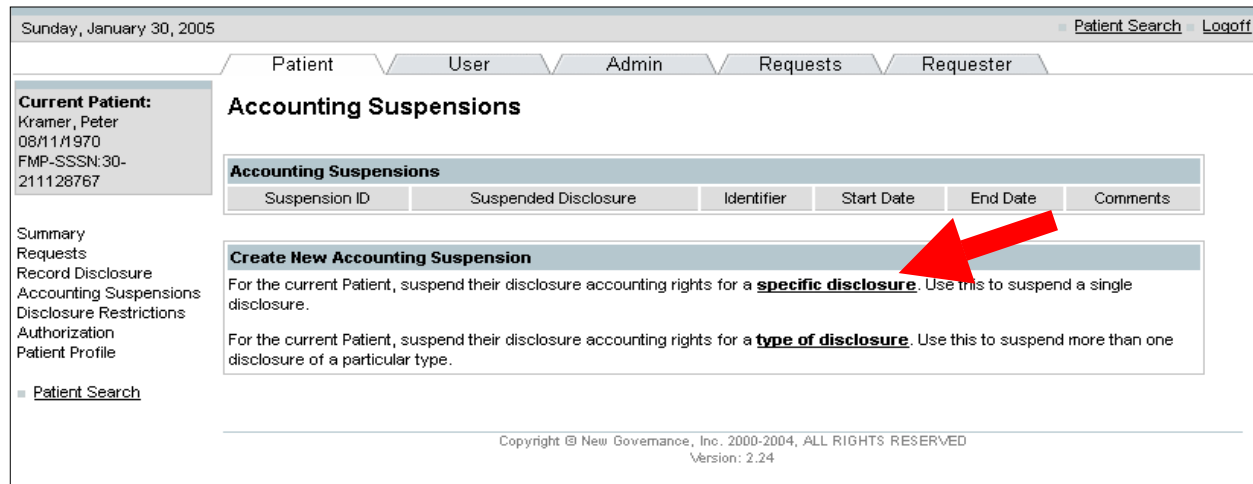
Two types of disclosures can be suspended: Law enforcement purposes and Health oversight activities. Privacy Specialists have the ability to enter an accounting suspension in two ways: Specific disclosure and Type of disclosure. As a best practice, it is recommended that users enter in an accounting suspension using the Specific disclosure hyperlink. Once a suspension has been entered, all users can view it.

To create a suspension:

1. Search for and select a patient record.
2. Select the Accounting Suspensions hyperlink.

Sunday, January 30, 2005		Patient Search Logoff	
Patient User Admin Requests Requester			
Current Patient: Kramer, Peter 08/11/1970 FMP-SSN: 30-211128767		Summary	
Summary Requests Accounting Suspensions Authorization Patient Profile Patient Search		Summary Item Filters Display <input type="checkbox"/> All <input type="checkbox"/> Disclosures <input type="checkbox"/> Suspensions <input type="checkbox"/> Restrictions <input type="checkbox"/> Reports <input type="checkbox"/> Letters <input type="checkbox"/> Authorizations <input type="checkbox"/> Complaints	
Copyright © New Governance, Inc. 2000-2004, ALL RIGHTS RESERVED Version: 2.24			

3. Select the Specific Disclosure hyperlink.



Sunday, January 30, 2005 [Patient Search](#) [Logoff](#)

Patient User Admin Requests Requester

Current Patient:
Kramer, Peter
08/11/1970
FMP-SSSN:30-
211128767

Summary
Requests
Record Disclosure
Accounting Suspensions
Disclosure Restrictions
Authorization
Patient Profile

[Patient Search](#)

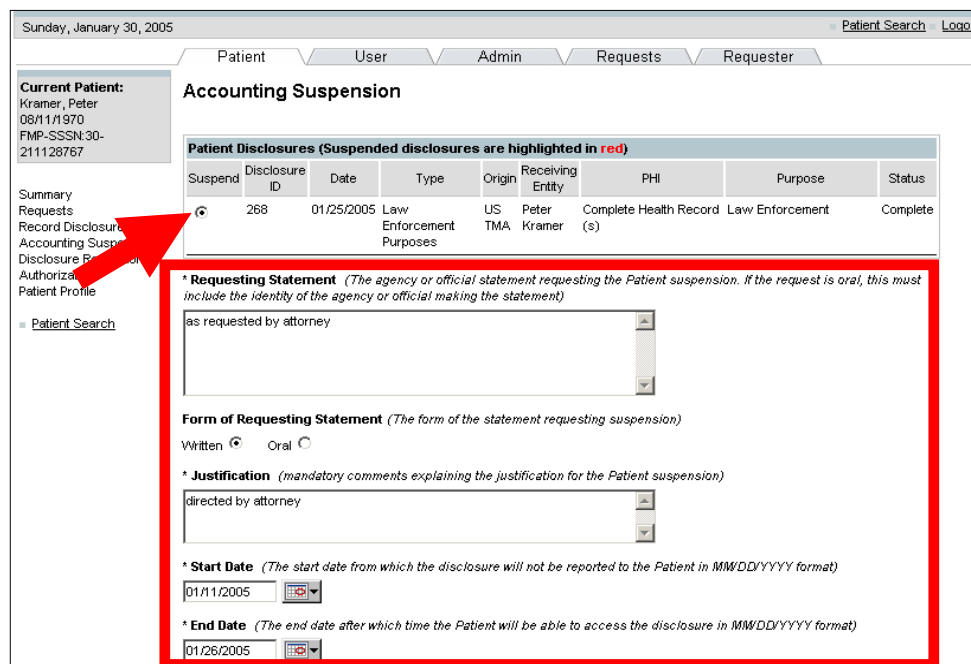
Accounting Suspensions

Suspension ID	Suspended Disclosure	Identifier	Start Date	End Date	Comments
<p>Create New Accounting Suspension</p> <p>For the current Patient, suspend their disclosure accounting rights for a specific disclosure. Use this to suspend a single disclosure.</p> <p>For the current Patient, suspend their disclosure accounting rights for a type of disclosure. Use this to suspend more than one disclosure of a particular type.</p>					

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Version: 2.24

4. Click on the radio button for the disclosure you want to suspend.

5. Enter the suspension details: (requesting statement and form, justification, and start and end date).



Sunday, January 30, 2005 [Patient Search](#) [Logoff](#)

Patient User Admin Requests Requester

Current Patient:
Kramer, Peter
08/11/1970
FMP-SSSN:30-
211128767

Summary
Requests
Record Disclosure
Accounting Suspensions
Disclosure Restrictions
Authorization
Patient Profile

[Patient Search](#)

Accounting Suspension

Patient Disclosures (Suspended disclosures are highlighted in red)

Suspend	Disclosure ID	Date	Type	Origin	Receiving Entity	PHI	Purpose	Status
<input checked="" type="radio"/>	268	01/25/2005	Law Enforcement Purposes	US TMA	Peter Kramer	Complete Health Record (s)	Law Enforcement	Complete

*** Requesting Statement** (The agency or official statement requesting the Patient suspension. If the request is oral, this must include the identity of the agency or official making the statement)

as requested by attorney

Form of Requesting Statement (The form of the statement requesting suspension)

Written ☒ Oral ☐

*** Justification** (mandatory comments explaining the justification for the Patient suspension)

directed by attorney

*** Start Date** (The start date from which the disclosure will not be reported to the Patient in MM/DD/YYYY format)

01/11/2005

*** End Date** (The end date after which time the Patient will be able to access the disclosure in MM/DD/YYYY format)

01/26/2005

6. Scroll to the bottom of the screen and click on the Save button.

Form of Requesting Statement *(The form of the statement requesting suspension)*

Written ☒ Oral ☐

*** Justification** *(mandatory comments explaining the justification for the Patient suspension)*

directed by attorney

*** Start Date** *(The start date from which the disclosure will not be reported to the Patient in MM/DD/YYYY format)*

01/30/2005

*** End Date** *(The end date after which time the Patient will be able to access the disclosure in MM/DD/YYYY format)*

02/05/2005

Identifier *(The OPTIONAL identifier for the suspension, could be a case number, warrant number, subpoena ID, etc.)*

Comments *(OPTIONAL general comments about or for the Patient)*

Save

7. Select the Summary hyperlink.

Sunday, January 30, 2005 Patient Search Logoff

Patient User Admin Requests Requester

Current Patient:
Kramer, Peter
08/11/1970
FMP-SSSN:30-
211128767

Accounting Suspension

Patient Disclosures (Suspended disclosures are highlighted in red)

Suspend	Disclosure ID	Date	Type	Origin	Receiving Entity	PHI	Purpose	Status
<input checked="" type="checkbox"/>	268	01/25/2005	Law Enforcement Purposes	US TMA	Peter Kramer	Complete Health Record (s)	Law Enforcement	Complete

*** Requesting Statement** *(The agency or official statement requesting the Patient suspension. If the request is oral, this must include the identity of the agency or official making the statement)*

as requested by attorney

Form of Requesting Statement *(The form of the statement requesting suspension)*

Written ☒ Oral ☐

*** Justification** *(mandatory comments explaining the justification for the Patient suspension)*

directed by attorney

8. Check the Suspensions checkbox.
9. Click on the Display button.

- The Disclosure that you suspended will display in the Disclosure Accounting Suspensions section.

Sunday, January 30, 2005 Patient Search Logoff

Patient User Admin Requests Requester

Current Patient:
Kramer, Peter
08/11/1970
FMP-SSSN:30-211128767

Summary

Summary Item Filters Display

☐ All ☐ Disclosures ☒ Suspensions ☐ Restrictions ☐ Reports ☐ Letters ☐ Authorizations ☐ Complaints

Disclosure Accounting Suspensions

Suspension ID	Suspended Disclosure	Identifier	Start Date	End Date	Comments
88	The specific disclosure of type Law Enforcement Purposes that occurred on 01/25/2005 with a disclosure ID of 268		01/30/2005	02/05/2005	

Summary
Requests
Record Disclosure
Accounting Suspensions
Disclosure Restrictions
Authorization
Patient Profile

■ Patient Search

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Version: 2.24

8.8 RECORD COMPLAINTS

NOTE: The Record Complaint is performed on the Requests tab and has three steps: select complainant, complaint details, and request action.

To record a complaint:

1. Select the Requests Tab.
2. Select Complaint in the Select Request Type box.
3. Click on the Next button.

Monday, February 21, 2005 Patient Search Logoff

Patient User Admin Requests Requester

Current Request:
None

Create New Request

Select Request Type

☒ Complaint
☐ Disclosure
☐ Disclosure Accounting

Next

■ Create New Request
■ Search for a Request

4. Type in the name of the person making the complaint or their FMP-SSSN.

5. Click on the Search button.

Monday, February 21, 2005 Patient Search Logoff

Patient User Admin Requests Requester

Current Request:
Complaint

1 2 3

1 Create New Request
2 Search for a Request

Patient Search

FMP-SSSN (Family Member Prefix and Sponsor SSN (in xx-xxx-xx-xxxx format))

20 - 121 - 13 - 1414

- OR -

by Name (Last) (First)

,

- OR -

by System ID (the identifier created by this system for the person)

Search

6. Select the person from the Patient Search Results screen.

Monday, February 21, 2005 Patient Search Logoff

Patient User Admin Requests Requester

Current Request:
Complaint

1 2 3

1 Create New Request
2 Search for a Request

Patient Search Results

Search Results for FMP-SSSN = [*20-121131414] (sorted by birth date)

ID	FMP	Name	SSN	Birth Date	Address
292	20	Smith, Joe J	121131414	1968-07-05	23 King St. Charleston, SC 84536

FMP-SSSN 20-121131414 (2004-07-20 to 2004-07-20)

Select

Other options:
[Adjust your search criteria and try again.](#)
[Create a new Patient record.](#)

- The Complaint Details screen appears.
7. Provide the required information: (complaint type, complaint date, the subject and description of the complaint).

8. Click on the Next button.

Monday, February 21, 2005 Patient Search Logoff

Patient User Admin Requests Requester

Current Request: Complaint

Select Complainant **Complaint Details** Request Action

1 2 3

Create New Request
Search for a Request

Complaint Details

Complainant (the person who is making the complaint)
Name: Joe Smith

Complaint Type (the type of complaint to create)
Notice of Privacy Practices Complaint

Complaint Date (the date the complaint was received in MM/DD/YYYY format)
02/07/2005

Subject (indicate subject of the complaint, could be person's name)
Release of information to doctor outside preferred network.

Complaint Description (the description of the complaint)
Medical history only to be released to Acme healthcare; however, it was also released to doctors outside the preferred network.

Back Next

9. Select the action to be taken.

10. Click on the Save button.

Monday, February 21, 2005 Patient Search Logoff

Patient User Admin Requests Requester

Current Request: Complaint

Select Complainant Complaint Details **Request Action**

1 2 3

Create New Request
Search for a Request

Request Action

Patient
Name: Joe Smith
SSN #: 121131414
Birth Date: 07-05-1968
Address: 23 King St., Charleston, SC 84536

Details of the Request (requester's comments about the scope of this request)
Medical history only to be released to Acme healthcare; however, it was also released to doctors outside the preferred network.

Approved Part (for partially approved requests, describe part of request that was approved)

Denied Part (for partially denied requests, describe part of request that was denied)

Action (action for this request)
Route to My Worklist

Back Save

- The Request Summary screen appears.

- The details of the complaint are displayed on the Request Summary screen.

Monday, February 21, 2005 Patient Search Logoff

Patient User Admin Requests Requester

Current Request: Complaint

Request Summary

Patient
Name: Joe J Smith
SSN #: 121131414
Birth Date: 07-05-1968
Address: 23 King St., Charleston, SC 84536

Request Status: Routed Complaint For Acknowledgement
Request Creation Date: 02/21/2005 at 06:02:16 PM EST
Request Last Update Date: 02/21/2005 at 06:02:18 PM EST

Other Request Details	
Description	Details
Request Type	Complaint
Details of the Request	Medical history only to be released to Acme healthcare; however, it was also released to doctors outside the preferred network.
ComplaintID	26

***NOTE:** The complaint is displayed on your worklist.*

To view the complaint:

- Select the User Tab.
- Select the My Worklist hyperlink.

The complaint is listed under Activity ID.

Monday, February 21, 2005 Patient Search Logoff

Patient User Admin Requests Requester

Current User: Wilson, James
US TMA

User Worklist

My Profile
My Requests
My Worklist
Switch organizations

Activity Instance ID	Request Session ID	Activity ID	Source	Patient	Requester	Status	Creation Date
edit 425	344	Complaint Acknowledgement	Smith, Joe J	Smith, Joe J	Smith, Joe J	Action Pending	02/21/2005
edit 395	318	Request Acceptance (Disclosure Accounting)	Smith, Joe J	Smith, Joe J	Smith, Joe J	Action Pending	02/11/2005
edit 390	313	Request Acceptance (Disclosure Accounting)	Smith, Joe J	Law Offices of Joe Gibbs	Law Offices of Joe Gibbs	Action Pending	02/03/2005

Naval Hospital Worklist

Activity Instance ID	Request Session ID	Activity ID	Source	Patient	Requester	Status	Creation Date
There are no activities for this queue							

Accept

***NOTE:** You can also view a summary of the complaint.*

To view a summary of the complaint:

1. Select the Patient Tab.
2. Select the Complaints box.
3. Click on the Display button.

The Patient Summary screen displays the type of complaint action.

Monday, February 21, 2005 Patient Search Logoff

Patient User Admin Requests Requester

Current Patient:
Smith, Joe J
07/05/1968
FMP-SSSN:20-
121131414

Summary
An alternate address exists for this patient.

Summary Item Filters

☐ All ☐ Disclosures ☐ Suspensions ☐ Restrictions ☐ Reports ☐ Letters ☐ Authorizations ☒ Complaints

Privacy & Policy Complaints

ID	Complaint Type	Complaint Date	Outcome Type	Outcome Date
26	Notice of Privacy Practices Complaint	02/07/2005	Undefined	

[Patient Search](#)

8.9 RECORD DISCLOSURE RESTRICTIONS

As a Privacy Specialist you are able to enter a Restriction of Disclosure or terminate a Restriction of Disclosure. Restriction of Disclosures allows members to restrict uses and disclosure of their PHI.

When selecting the Disclosure Type if you determine that you need a new type of disclosure, contact the HIPAA Support Center.

***NOTE:** Ensure that you enter specific details of what information is being restricted. It is important to be specific in this entry because it will provide other staff members with the details about the individual and organization, and about the restrictions on the disclosure.*

To record a disclosure restriction:

1. Search for and select a patient record.

2. Select the Disclosure Restrictions hyperlink.

The screenshot shows the 'Summary' page for Patient Kramer, Peter. The left sidebar contains a list of links: Summary, Requests, Record Disclosure, Accounting Suspensions, **Disclosure Restrictions** (highlighted with a red circle), Authorization, and Patient Profile. The main content area shows 'Summary Item Filters' with checkboxes for All, Disclosures, Suspensions, Restrictions, Reports, Letters, Authorizations, and Complaints. The 'Restrictions' checkbox is selected. The bottom of the page displays copyright information: 'Copyright © New Governance, Inc. 2000-2004, ALL RIGHTS RESERVED Version: 2.24'.

3. Click on the New button in the Disclosures Restrictions box.

The screenshot shows the 'Disclosure Restrictions' page. A red arrow points to the 'New' button in the 'Disclosures Restrictions' section. The page includes a table with columns: ID, Type, Start Date, End Date, Outcome, Destination, and Details. The bottom of the page displays copyright information: 'Copyright © New Governance, Inc. 2000-2004, ALL RIGHTS RESERVED Version: 2.24'.

4. Enter the Disclosure Restriction details: (disclosure type, start and end date, restriction destination (to whom information is being restricted) and details).

5. Select Approved or Denied from the Outcome drop-down box.

6. Click on the Save button.

The screenshot shows the 'Disclosure Restriction' form. A red box highlights the form fields: 'Disclosure Type' (Medical Facility Patient Directories), 'Start Date' (01/26/2005), 'End Date' (OPTIONAL end date at which time US TMA will begin to share this information again; in MM/DD/YYYY format), 'Restriction Destination' (spouse), 'Details of Restriction' (all medical records), 'Outcome' (Approved), and a 'Save' button. A red arrow points to the 'Save' button. The bottom of the page displays copyright information: 'Copyright © New Governance, Inc. 2000-2004, ALL RIGHTS RESERVED Version: 2.24'.

- The Patient Disclosure Restriction screen re-appears with your information. Save has changed to Update.

Once you have approved or denied the disclosure restriction you have the ability to generate an approval or denial letter. The letter will be pre-populated with the information that you entered for that particular restriction.

To print the Approval or Denial Letter:

1. Select the title of the letter in the Letters box on the Patient Disclosure Restriction screen.

Sunday, January 30, 2005 Patient Search Logout

Patient User Admin Requests Requester

Current Patient:
Kramer, Peter
08/11/1970
FMP-SSSN:30-
211128767

Summary
Requests
Record Disclosure
Accounting Suspensions
Disclosure Restrictions
Authorization
Patient Profile

■ Patient Search

Disclosure Restriction

* **Disclosure Type** (the type of disclosure to restrict)
Medical Facility Patient Directories

* **Start Date** (The start date from which US TMA will not share this information with identified party; in MM/DD/YYYY format)
01/26/2005

End Date (The OPTIONAL end date at which time US TMA will begin to share this information again; in MM/DD/YYYY format)

* **Restriction Destination** (to whom information is being restricted?)
spouse

Details of Restriction (what information is being restricted?)
all medical records

Outcome (indicate whether request was approved or denied)
Approved

Update

Letters (Click on the link to view and print the document)

ID	Title
401	Disclosure Restriction - Approval Letter

- The Approval/Denial letter is generated.

DEPARTMENT OF DEFENSE
US TMA
Five Skyline Place
5111 Leesburg Pike
Falls Church, VA 22041-3206

30 Jan 05

Peter Kramer
211 River Rd.
Alexandria, VA 22454

Dear Peter Kramer

This letter is to inform you that we are granting your request to restrict your Protected Health Information with a specific person or a specific business that you identified in your Health Information Restriction Form. Your request has been approved.

Your information will not be disclosed to the specified person or entity. We will comply with this request until you tell us to end this restriction unless the information is needed to provide emergency treatment to you.

If you have questions please contact the US TMA, Five Skyline Place, 5111 Leesburg Pike, Falls Church, VA 22041-3206.

Sincerely

8.10 GENERATE AUTHORIZATIONS

Record an Authorization by the patient when there is an exchange of PHI that occurs outside of the treatment, payment, or healthcare options.

Select Type of authorization. *NOTE: Based on the Type selected, the following fields are populated; however that data can be changed.*

Enter PHI to be released as it was entered on the authorization form. *NOTE: The greater the detail that is provided by the patient, the easier it will be to respond to the request at the time of disclosure.*

NOTE: Enter either the Authorization Expiration or an Action Completed date; not both. If there is no expiration date, then enter text in the Action Completed field (ex. Authorization to remain in effect until revoked.)

NOTE: Once the authorization has been manually signed you can go back into the particular authorization and select the Signed checkbox and enter the date of the signature using MM/DD/YYYY format or the calendar icon to select a date.

To generate an authorization:

1. Select the Patient Tab.
2. Search for and select the patient record.
3. Select the Authorization hyperlink.

The screenshot displays the Military Health System interface. At the top, the date is Sunday, January 30, 2005, and there are links for Patient Search and Logoff. Below the date bar, there are tabs for Patient, User, Admin, Requests, and Requester. The Patient tab is selected. On the left side, there is a sidebar with a 'Current Patient' section showing 'Smith, Joe J' with a date of birth '07/05/1968' and an FMP-SSSN '20-121131414'. Below this, there is a list of links: Summary, Requests, Record Disclosure, Accounting Suspensions, Restrictions, Authorization (highlighted with a red circle), and Patient Home. At the bottom of the sidebar is a 'Patient Search' button. The main content area is titled 'Summary' and contains a message: 'An alternate address exists for this patient.' Below this message is a 'Summary Item Filters' section with a 'Display' button and several checkboxes: All, Disclosures, Suspensions, Restrictions, Reports, Letters, Authorizations, and Complaints. At the bottom of the page, there is a copyright notice: 'Copyright © New Governance, Inc. 2000-2004, ALL RIGHTS RESERVED' and 'Version: 2.24'.

4. Select the Authorization Type from the drop-down box.

5. Enter the Authorization Details: (reason for request, releasing organization, and recipient).

Sunday, January 30, 2005 Patient Search Logoff

Patient User Admin Requests Requester

Current Patient:
Smith, Joe J
07/05/1968
FMP-SSSN:20-
121131414

Summary
Requests
Record Disclosure
Accounting Suspensions
Disclosure Restrictions
Authorization
Patient Profile

[Patient Search](#)

Authorization

Type (the type of authorization to create)
Standard Authorization

Protected Health Information to be Released (the part of the medical record to be released, such as "complete medical record", "pathology report", etc.)
entire medical record

Reason for Request/Use of Medical Information (a description of each purpose of the requested use or disclosure)

☐ Continued Medical Care
☐ Insurance
☐ Legal
☒ Personal Use
☐ Retirement/Separation
☐ School

Other:
patient authorizes his brother to have a copy of entire medical record.

Releasing Organization (Organization that released the authorization)
USADC-Hospital

Recipient (the name, complete mailing address, phone and fax of the individual or class of individuals to receive the PHI)
1100 Main Street

6. Scroll down the screen and enter: (authorization start and expiration date, treatment type, and treatment start and end date).
7. Place a check in the Generate Authorization checkbox.
8. Click on the Save button.

Authorization Start Date (the effective date of the authorization in MM/DD/YYYY format)
06/08/2004

Authorization Expiration (the expiration date of the authorization in MM/DD/YYYY format, an **Action Completed** may be used instead of a date)
06/08/2005

Action Completed (the expiration event for the authorization, such as "Upon completion of the investigation", an **Authorization Expiration** may be used instead of an action if known)

Treatment Type (the type of Treatment)
Outpatient and Inpatient

Treatment Start Date (the treatment or service start date in MM/DD/YYYY format)
03/01/2004

Treatment End Date (the treatment or service end date in MM/DD/YYYY format)

Generate Authorization (generate Authorization for Disclosure form for printing purposes)
☒

Save

- The Signed Status and Revoked Status boxes on this screen indicate if the DD Form 2870 is signed or revoked.

Update

Signed Status

☐ Signed (checked if the authorization is signed)

Signed Date (the date that the authorization is signed in MM/DD/YYYY format)

01/30/2005

Signed By Person (the individual who signed the authorization)

Joe J Smith

Revoked Status

☐ Revoked (checked if the authorization is revoked)

Revoked Date (the date that the authorization was revoked in MM/DD/YYYY format)

01/30/2005

Revoked By Person (the individual who revoked the authorization)

Joe J Smith

Update

- A note appears at the top of the screen indicating the authorization is saved and that only the “Signed” or “Revoked” status fields may be changed at this point.

9. Select the Summary hyperlink.

Sunday, January 30, 2005

Patient Search Logoff

Patient User Admin Requests Requester

Current Patient:
Smith, Joe J
07/05/1968
FMP-SSSN:20-
121131414

Summary

Record Disclosure
Accounting Suspensions
Disclosure Restrictions
Authorization
Patient Profile

■ Patient Search

Authorization

This authorization has been saved. Only the 'signed' and/or 'revoked' status fields (at the bottom of the page) can be updated.

Authorization Document (the physical authorization document generated by the application)
Standard Authorization (Document ID #402)

Type (the type of authorization to create)
Standard Authorization

Protected Health Information to be Released (the part of the medical record to be released, such as "complete medical record", "pathology report", etc.)
entire medical record

Reason for Request/Use of Medical Information (a description of each purpose of the requested use or disclosure)
☐ Continued Medical Care

10. Place a check in the Authorizations checkbox.

11. Click on the Display button.

Sunday, January 30, 2005 Patient Search Logoff

Patient User Admin Requests Requester

Current Patient:
Smith, Joe J
07/05/1968
FMP-SSSN: 20-121131414

Summary
Requests
Record Disclosure
Accounting Suspensions
Disclosure Restrictions
Authorization
Patient Profile

Summary
An alternate address exists for this patient.

Summary Item Filters Display

☐ All ☐ Disclosures ☐ Suspensions ☐ Restrictions ☐ Reports ☐ Letters ☒ **Authorizations** ☐ Complaints

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Version: 2.24

[Patient Search](#)

- The new authorization will appear on the Summary screen.

To generate the DD Form 2870 (Adobe Acrobat format):

1. Select the Authorization title hyperlink.

Sunday, January 30, 2005 Patient Search Logoff

Patient User Admin Requests Requester

Current Patient:
Smith, Joe J
07/05/1968
FMP-SSSN: 20-121131414

Summary
Requests
Record Disclosure
Accounting Suspensions
Disclosure Restrictions
Authorization
Patient Profile

Summary
An alternate address exists for this patient.

Summary Item Filters Display

☐ All ☐ Disclosures ☐ Suspensions ☐ Restrictions ☐ Reports ☐ Letters ☒ **Authorizations** ☐ Complaints

Authorizations (Revoked authorizations are highlighted in red)

ID	Description	Signed	Expiration	Revoked
40 Standard Authorization	For disclosures of 'entire medical record' to '1100 Main Street Woodbridge, VA 22321'		02/03/2006	
124 Standard Authorization	For disclosures of 'medical record' to 'Jenny Smith 152 Brook Land Charleston SC 29404'	07/20/2004	07/27/2005	07/20/2004

[Patient Search](#)

- You may print the form and request the patient's signature.

AUTHORIZATION FOR DISCLOSURE OF MEDICAL OR DENTAL INFORMATION

The purpose of this form is to provide the MTF/DTF/TRICARE Health Plan with a means to request the use and/or disclosure of an individual's protected health information. Guidelines regarding use of this form are contained in DOD Regulation 6025.18-R.

This form will not be used for authorization to disclose alcohol or drug abuse patient information from medical records or for authorization to disclose information from records of an alcohol or drug abuse treatment program. In addition, any use as an authorization to use or disclose psychotherapy notes may not be combined with another authorization except one to use or disclose psychotherapy notes.
Privacy Act of 1974 applies

PATIENT DATA

Name (Last, First, MI) Smith, Joe, J	Date of Birth 07-05-1968	Patient SSN 121131414
Period of Treatment 01-11-2005- 01-11-2005	Type of Treatment: Outpatient	

DISCLOSURE

I authorize USADC-Hospital (Name of MTF/DTF) to release my patient information to recipient: 1100 Main Street Woodbridge, VA 22321	Reason for Request/Use of Medical Information: Personal Use, patient authorizes his brother to have a copy of entire medical record.
Information to be Released: entire medical record	

8.11 SIGN AN AUTHORIZATION

Once an authorization has been entered, it needs to be signed by the patient for validation. After the authorization is signed by the patient, a user has the ability to document the signature within the PHIMT.

To sign an authorization:

- Select the authorization ID hyperlink to return to the detailed authorization record.

Sunday, January 30, 2005 [Patient Search](#) [Logoff](#)

Patient User Admin Requests Requester

Current Patient:
Smith, Joe J
07/05/1968
FMP-SSSN:20-
121131414

Summary
Requests
Record Disclosure
Accounting Suspensions
Disclosure Restrictions
Authorization
Patient Profile
[Patient Search](#)

Summary
An alternate address exists for this patient.

Summary Item Filters [Display](#)

☐ All ☐ Disclosures ☐ Suspensions ☐ Restrictions ☐ Reports ☐ Letters ☒ Authorizations ☐ Complaints

Authorizations (Revoked authorizations are highlighted in red)

ID	Title	Description	Signed	Expiration	Revoked
402	Standard Authorization	For disclosures of 'entire medical record' to '1100 Main Street Woodbridge, VA 22321'		02/03/2006	
24	Standard Authorization	For disclosures of 'medical record' to 'Jenny Smith 152 Brook Land Charleston SC 29404'	07/20/2004	07/27/2005	07/20/2004

- Scroll to the bottom of the page to the Signed Status box.
- Place a check in the Signed Status checkbox.

4. Select the date and the authorizing person's identity from the drop-down box.
5. Click on the Update button.

Signed Status
Signed (checked if the authorization is signed)
☒
Signed Date (the date that the authorization is signed in MM/DD/YYYY format)
01/30/2005
Signed By Person (the individual who signed the authorization)
Joe J Smith

Revoked Status
Revoked (checked if the authorization is revoked)
☐
Revoked Date (the date that the authorization was revoked in MM/DD/YYYY format)
01/30/2005
Revoked By Person (the individual who revoked the authorization)
Joe J Smith

Update

6. Select the Summary hyperlink.
7. Place a check in the Authorizations checkbox.
8. Click on the Display button.

Sunday, January 30, 2005 Patient Search Logoff

Patient User Admin Requests Requester

Current Patient:
Smith, Joe J
07/05/1968
FMP-SSSN: 20-
121131414

Summary
An alternate address exists for this patient.

Summary Item Filters Display
☐ All ☐ Disclosures ☐ Suspensions ☐ Restrictions ☐ Reports ☐ Letters ☒ Authorizations ☐ Complaints

Record Disclosure
Accounting Suspensions
Disclosure Restrictions
Authorization
Patient Profile

■ Patient Search

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- You will now see that the authorization indicates that it has been signed.

Sunday, January 30, 2005 Patient Search Logoff

Patient User Admin Requests Requester

Current Patient:
 Smith, Joe J
 07/05/1968
 FMP-SSSN: 20-121131414

Summary
Requests
Record Disclosure
Accounting Suspensions
Disclosure Restrictions
Authorization
Patient Profile

[Patient Search](#)

Summary

An alternate address exists for this patient.

Summary Item Filters Display

☐ All
 ☐ Disclosures
 ☐ Suspensions
 ☐ Restrictions
 ☐ Reports
 ☐ Letters
 ☒ Authorizations
 ☐ Complaints

Authorizations (Revoked authorizations are highlighted in red)

ID	Title	Description	Signed	Expiration	Revoked
402	Standard Authorization	For disclosures of 'entire medical record' to '1100 Main Street Woodbridge, VA 22321'	01/30/2005	02/03/2006	
124	Standard Authorization	For disclosures of 'medical record' to 'Jenny Smith 152 Brook Land Charleston SC 29404'	07/20/2004	07/27/2005	07/20/2004

8.12 REVOKE AN AUTHORIZATION

Previously generated authorizations may need to be revoked as a result of legal issues, new information, or for other reasons.

To revoke an authorization:

- Select the Patient Tab.
- Select the Authorization ID hyperlink.

Sunday, January 30, 2005 Patient Search Logoff

Patient User Admin Requests Requester

Current Patient:
 Smith, Joe J
 07/05/1968
 FMP-SSSN: 20-121131414

Summary
Requests
Record Disclosure
Accounting Suspensions
Disclosure Restrictions
Authorization
Patient Profile

[Patient Search](#)

Summary

An alternate address exists for this patient.

Summary Item Filters Display

☐ All
 ☐ Disclosures
 ☐ Suspensions
 ☐ Restrictions
 ☐ Reports
 ☐ Letters
 ☒ Authorizations
 ☐ Complaints

Authorizations (Revoked authorizations are highlighted in red)

ID	Title	Description	Signed	Expiration	Revoked
402	Standard Authorization	For disclosures of 'entire medical record' to '1100 Main Street Woodbridge, VA 22321'	01/30/2005	02/03/2006	
124	Standard Authorization	For disclosures of 'medical record' to 'Jenny Smith 152 Brook Land Charleston SC 29404'	07/20/2004	07/27/2005	07/20/2004

- Scroll to the bottom of the screen to the Revoked Status box.
- Place a check in the Revoked check box.

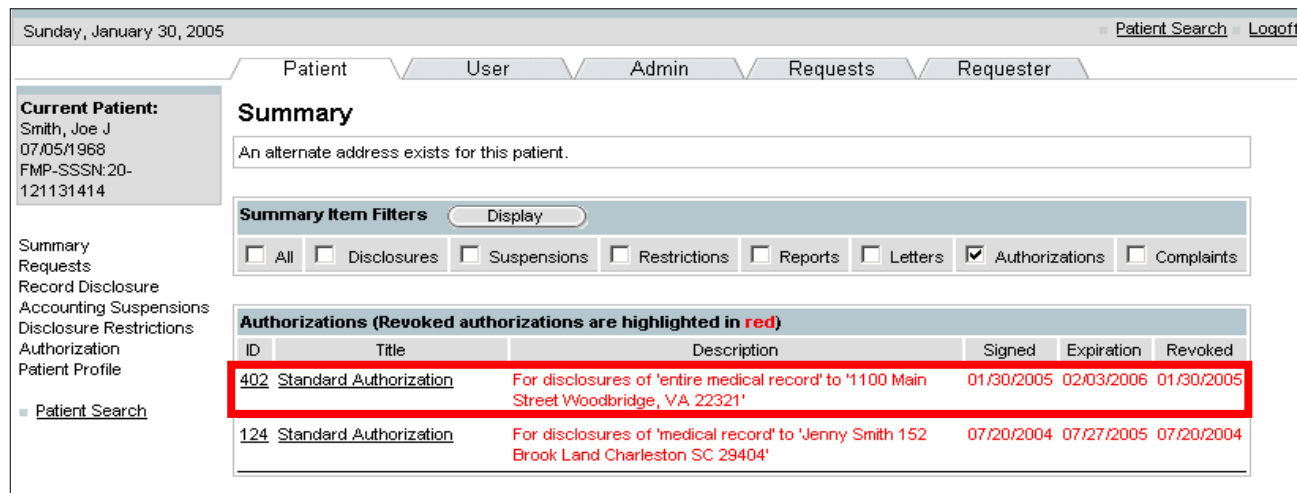
5. Select the date and the revoking person's identity in the drop-down box.
6. Click on the Update button.

The screenshot shows a web form with two main sections: 'Signed Status' and 'Revoked Status'. The 'Revoked Status' section is highlighted with a red rectangular box. It contains the following fields: a checked 'Revoked' checkbox, a 'Revoked Date' field with a calendar icon set to 01/30/2005, and a 'Revoked By Person' dropdown menu set to 'Joe J Smith'. Below the 'Revoked Status' section is an 'Update' button, which is pointed to by a large red arrow from the left.

7. Select the Summary hyperlink to view the authorization.
8. Place a check in the Authorizations checkbox.
9. Click on the Display button.

The screenshot shows a patient summary page for 'Smith, Joe J'. On the left sidebar, the 'Summary' link is circled in red. The main content area is titled 'Summary' and includes a message: 'An alternate address exists for this patient.' Below this is a 'Summary Item Filters' section with a 'Display' button highlighted by a red arrow. The filters include checkboxes for 'All', 'Disclosures', 'Suspensions', 'Restrictions', 'Reports', 'Letters', 'Authorizations' (which is checked and highlighted with a red box), and 'Complaints'. The footer of the page contains copyright information: 'Copyright © New Governance, Inc. 2000-2004, ALL RIGHTS RESERVED' and 'Version: 2.24'.

- The revoked authorization is highlighted in red.



Sunday, January 30, 2005 Patient Search Logoff

Patient User Admin Requests Requester

Current Patient:
Smith, Joe J
07/05/1968
FMP-SSSN: 20-121131414

Summary
Requests
Record Disclosure
Accounting Suspensions
Disclosure Restrictions
Authorization
Patient Profile
[Patient Search](#)

Summary
An alternate address exists for this patient.

Summary Item Filters

☐ All ☐ Disclosures ☐ Suspensions ☐ Restrictions ☐ Reports ☐ Letters ☒ Authorizations ☐ Complaints

Authorizations (Revoked authorizations are highlighted in red)

ID	Title	Description	Signed	Expiration	Revoked
402	Standard Authorization	For disclosures of 'entire medical record' to '1100 Main Street Woodbridge, VA 22321'	01/30/2005	02/03/2006	01/30/2005
124	Standard Authorization	For disclosures of 'medical record' to 'Jenny Smith 152 Brook Land Charleston SC 29404'	07/20/2004	07/27/2005	07/20/2004

8.13 ADMINISTRATIVE SUMMARY REPORTS

Administrative summaries provide a visual representation by organization of:

- Disclosures over a 12 month period
- All requests by type
- All requests over a 12 month period
- Top recipients of disclosures
- Top requesters for all requests

The Administrative Summary Reports are performed by Privacy Specialists and User Admins.

To create an Administrative Summary Report:

1. Select the Admin Tab.
2. Select the Administrative Summary hyperlink.



Sunday, January 30, 2005 Patient Search Logoff

Patient User Admin Requests Requester

Current Admin:
Wilson, James
US TMA

Administrative Summary

Origin Organizations

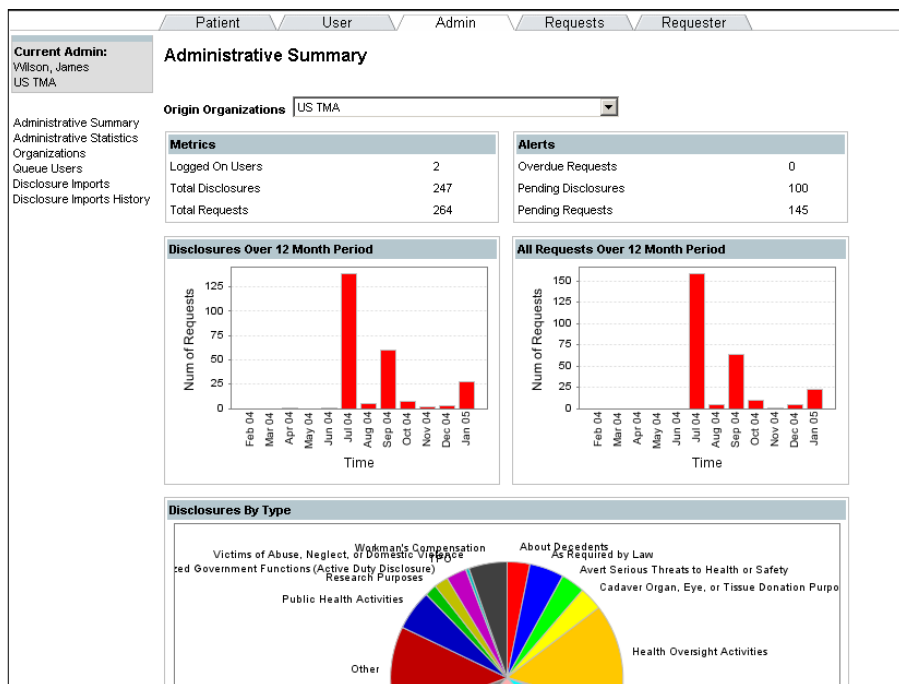
Administrative Summary
Administrative Statistics
Organizations
Queue Users
Disclosure Imports
Disclosure Imports History

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Version: 2.24

3. Select your Organization from the drop-down box.

The screenshot shows the 'Administrative Summary' page. On the left is a sidebar with a 'Current Admin' section (Wilson, James, US TMA) and a list of links: Administrative Summary, Administrative Statistics, Organizations, Queue Users, Disclosure Imports, and Disclosure Imports History. The main content area has tabs for Patient, User, Admin, Requests, and Requester. The 'Origin Organizations' drop-down menu is open, showing a list of organizations including 'All', '10th MED GROUP-USA F ACADEMY CO', '10th Med GROUP- PETERSON AFB', '11TH MED GRP-BOLLING', '11th Wing', '121ST GEN HOSP SEOUL', '12th MED GRP-RANDOLPH', '14th MED GRP-COLUMBUS', '15th MED GRP-HICKAM', and '16th MED GRP-HURLBURT FIELD'. A red arrow points to the drop-down menu.

- The Administrative Summary reports will display.



9.0 PRIVACY SPECIALIST GLOSSARY

Accounting Suspension: In PHIMT, an accounting suspension is an action that results in the temporary postponement of a previously approved disclosure. The suspension can be either specific (referring to a particular disclosure) or type (referring to a disclosure of a particular type). Suspensions can be oral, lasting for up to thirty days, or written, lasting up to six months.

Admin Tab: The Admin tab is one of five label tags that provide access to user admin activities that include maintaining organizations in the PHIMT database.

Action: Action is a PHIMT term for a specific activity that requires a responsive judgment.

Attach: Attach is a PHIMT option that allows the user to send documentation or files with a disclosure.

Authorization: Authorization is a hyperlink on the Patient tab that allows the user to process an approval for a disclosure.

Back: Back is a navigation button that allows the user to return to the previous screen.

Complaint: Complaint is a PHIMT activity that allows a user to file a HIPAA grievance against a person or organization.

Create: Create is a PHIMT option that allows the user to initiate a new activity.

Create New Request: Create new request is a hyperlink on the Requests tab that allows the user to initiate a request for a new disclosure activity.

Disclosure: Disclosure is a hyperlink on the Requests tab that allows the user to process a release of protected health information.

Disclosure Accounting: Disclosure accounting is a hyperlink on the Requests tab that allows the user to process a justification for a disclosure.

Disclosure Details: Disclosure details is a PHIMT term that refers to information about a specific release that the user can view on the patient summary screen.

Disclosure Restriction: Disclosure restriction is a PHIMT term that refers to placing constraints on either the information being released or its recipient.

Display: Display is a PHIMT option that allows the user to view various types of information about a particular patient or disclosure activity.

Logoff: Logoff is a hyperlink that allows the user to exit PHIMT.

Login: Login is the PHIMT opening screen that requires a User ID and password.

MTF: MTF is a PHIMT acronym for Military Treatment Facility.

My Profile: My profile is a hyperlink on the User tab that allows a user to update personal information.

My Requests: My Requests is a hyperlink on the User tab that allows users to view the status of all requests initiated by them.

My Worklist: My Worklist is a hyperlink on the User tab that serves as an electronic inbox by allowing users to view all tasks currently assigned to them.

Next: Next is a PHIMT action button that allows the user to proceed to the next step in an activity.

New: New is a PHIMT action button that allows the user to develop a new item patient, organization.

New Patient Record: New patient record is a hyperlink on the Patient Search Results screen that allows users to provide information about a new patient.

Organization: In PHIMT, an organization is a logical or physical entity such as MTF, a service, or TMA.

Organization Management: Organization management is a hyperlink on the Admin tab that allows the privacy specialist to create and/or modify requester/recipient facilities within the PHIMT database. This term refers to the process of maintaining organization profiles and status.

Patient Profile: Patient Profile is a Hyperlink on the Patient tab that allows the user to create or edit patient information.

Patient Search: Patient Search is a hyperlink on the Patient tab that allows the user to look for a particular patient in the PHIMT database.

Patient Tab: Patient tab is a PHIMT tag or label that provides the user with patient specific activities.

PHI: PHI is an acronym for Protected Health Information.

PHIMT: PHIMT is an acronym for Protected Health Information Management Tool. PHIMT tracks disclosures of legally guarded-information with regards to HIPAA compliance.

Privacy Specialist: In PHIMT, A Privacy Specialist is the Privacy Officer or designee at an MTF or Service level. This role allows the user to maintain disclosure reporting, approve/deny disclosure requests, amend requests, and to restrict and suspend disclosures.

Record Disclosure: Record disclosure is a PHIMT term that refers to the documenting and confirmation of the release of protected health information.

Regular User: Regular user is a PHIMT general role with basic functionality. This role can create disclosures and authorization requests that can be routed to a Privacy Specialist.

Request: In PHIMT, a request is the first step in initiating a disclosure activity.

Request Action: In PHIMT, request action is a prompt for a specific performance on a disclosure.

Request Details: In PHIMT, request details allows the user to view relevant information about a particular disclosure.

Requester: In PHIMT, requester is a term that refers to the person making or issuing the activity.

Requester Profile: Requester profile is a hyperlink on the Requester tab that allows the user to view information about the individual or organization making the request.

Requester Requests: Requester requests is a hyperlink on the Requester tab that allows the user to view a listing of all requests made by a particular individual or organization.

Requester Search: Requester Search is a hyperlink on the Requester tab that allows the Privacy Specialist to look for the particular person or organization initiating the release of information.

Requester Summary: Requester summary is a hyperlink on the Requester tab that allows the user to view a brief of all requests initiated by an individual or organization.

Requester Tab: In PHIMT, the Requester tab is a tag or label that allows the user to access information about the individual or agency making a request for a disclosure.

Requests Tab: In PHIMT, the Requests tab is a tag or label that allows the user to access information about the activities requested by an individual or organization.

Restriction: In PHIMT, a restriction refers to a constraint put upon a particular disclosure activity. The constraint could refer to denying access to a particular individual or a particular time frame.

Revoke Authorization: In PHIMT, revoke authorization refers to a user rescinding a previous approval for a particular disclosure.

Routing: In PHIMT, routing refers to forwarding an approval for the disclosure request to your worklist for later action or to an individual of another role. For example, a Regular User may forward the approval request to a Privacy Specialist.

Save: Save is an action button that allows users to save data entries, information, and procedures.

Search: Search is an action button that allows users to search for a particular individual or activity.

Search for Request: Search for request is a hyperlink on the Requests tab that allows the user to look for a particular request made by that person.

Select: Select is an action button that allows users to select a particular patient or activity.

Status Box: In PHIMT, the status box is represented by a gray box in the upper left corner of all screens that displays the current information for a patient or activity; depending on actions being performed.

Summary: Summary is a hyperlink on the Patient tab that allows users to view a brief of all disclosure activities for a particular patient.

Summary Item Filter: Summary Item Filter is a feature accessed on the Patient Summary screen. This feature allows the user to display a synopsis on disclosures, suspensions, restrictions, reports, letters, and complaints.

Suspension: In PHIMT, Suspension refers to the act of delaying a disclosure or putting it on hold temporarily.

Switch Organizations: Switch Organizations is a hyperlink on the User tab that allows users who are assigned to more than one organization, to switch between their organizations. This allows them to change their primary status in an organization.

TMA: TMA is an acronym for Tricare Management Activity.

Update: Update is an action button that allows users to update information or perform additional activities.

User Profile: User Profile is a PHIMT term that is used when referring to the user preferences. This profile screen allows the regular user to update personal information and preference data about that user.

User Role: In PHIMT, role refers to a named collection of permissions. A role allows users with the same permissions to be grouped under a unique name such as: Regular User, User Admin, or Privacy Specialist. The MTF Privacy Officer usually determines the appropriate role.

User Search: User Search is a hyperlink on the Admin tab that allows the user admin to search for a particular user.

User Tab: The User tab is a tag or label that allows the user to access all PHIMT user related information. This tab is designed to track all tasks that are assigned to you.

User-to-User Relationship: User-to-User Relationship is a PHIMT term that refers to the different user types and how they work with one another. The User Admin creates this relationship as directed by the MTF Privacy Officer. The Privacy Officer understands how the MTF manages disclosures. The User Admin understands how to create a workflow by routing requests of a Regular User to a Privacy Specialist and from a Privacy Specialist to another Privacy Specialist, thereby creating the working relationships between the different PHIMT users. Multiple user relationships can be established throughout the Facility.

10.0 PRIVACY SPECIALIST ROLE PERMISSIONS

PHIMT PRIVACY SPECIALIST PERMISSIONS	
PHIMT Privacy Specialist Tab	Enabled Permissions
Logon/Logoff	Both
User Tab	Change password Switch to other organizations Update address User profile User workflow Workflow activity Workflow request Workflows tab
Admin Tab	Administrative workflow Attach file Backup person relationship Organization management
Patient Tab	Create patient New request: deny request now Patient accounting request Patient accounting suspensions Patient alternate communication Patient authorization Patient disclosure restrictions Patient profile Patient search Patient summary Patient workflow Record disclosure View disclosure
Requests Tab	Complaint workflow Disclosure accounting Disclosure request Disclosure imports Edit request: accept request Edit request: approve request Edit request: complete PHI retrieval Edit request: process complaint Edit request: route to another privacy specialist Edit request: route to other user New request: process request now New request: route to another privacy specialist New request: route to other user

PHIMT PRIVACY SPECIALIST PERMISSIONS	
PHIMT Privacy Specialist Tab	Enabled Permissions
	New request: route to My Worklist
Requester Tab	Requester summary Requester workflow